Get Paid to Get Clients Acceleration Program

Training Session #1
August 30, 2011

Welcome everyone to the *Get Paid to Get Clients* acceleration program kick-off session, and I'm personally super excited to be training you in this approach. It's something that's near and dear to my heart because it's worked so well for me; and if you do the work and let me guide you and get support from this entire group, I know it can work well for you.

And we've got a lot of things to cover today including a review of the program schedule and logistics and an overview of how the training works.

I'm going to give you a 60,000-foot view of the *Get Paid to Get Clients* approach; and then, we'll go down lower and I'll give you a 10,000-foot view of the approach; and then, we'll get down to ground level and I'll give you the first four specific steps of the *Get Paid to Get Clients* approach. There are actually 15 distinct steps. And then, I'll give you your first training mission or assignment.

Before we get going, I want to give everybody a chance to briefly introduce themselves. Since we have a number of people on the call, I think how this would best work is to have you just say your name and where you're from, what your business is, what you do, whom you serve, what your participation trigger was—in other words, why did you choose to join this program—and the most important thing, what you want to get from this program.

And if you could do your best to tell us your story in 90 seconds or less, that would be great practice for all of us and it'll give us a sense of who is in the program, with whom we're going to be working with and learning from; and we'll still have plenty of time for today's training.

So, who would like to go first?

KAT: Oh, George, since I don't have a whole lot to say … I'm Kat Wells and I'm right outside San Antonio, Texas. And, at this point, I don't have a business, and I'm trying to create one and use all my best talents. So, George will be helping me with that.

GEORGE: Excellent! Thanks, Kat. Kat's a private client so that's how we're going to get her work done. But this is going to be an important part of the foundation of her business.

Who would like to go next?

TIMOTHY: I will. My name is Timothy Karsten. I live and work in Pacific Palisades, California. My company is TDKA Group and I work with C-level managers, wealthy families who are struggling to realize their fullest potential both in their personal and professional lives and with the wealth that they have.

And why am I here? George invited me to participate. I'm also a private client. And so, I'm here to learn whatever pearls of wisdom George has to offer and also, I believe, explore how a webinar is done properly.

GEORGE: Timothy, tell them the truth. Tell them I forced you to show up.

TIMOTHY: That's true.

GEORGE: Okay, welcome. Who would like to go next?

JUDY: Judy Murdoch , Denver, Colorado. My business is Highly Contagious Marketing; and I work with small business owners but, primarily, business coaches and consultants. And the way I help them is … my focus is on helping them develop information products so they can take all the stuff they know and their experience and all the good stuff they have and actually turn those into products that they can earn revenue from with their participation or without their participation.

And the trigger for me was I listened to the teleclass that Robert Middleton did, and I'm in a little bit of a transition point because I've changed the focus of my business from sort of general marketing to product development. So, I am more than ready to get some great clients and work on some great products.

And my desired outcome is to really have a great system in place; and I am ready to implement like today so this was like perfect timing for me.

GEORGE: Welcome. Thank you. Who would like to introduce themselves next?

SAM: I'll jump in next. Judy inspired me, George, because I have a similar business to hers. My name is Sam Wieder. I'm from Greensburg, Pennsylvania which is near Pittsburgh in the western part of the state. My business name is called Commanding Confidence. I focus also on working with independent professionals such as coaches, consultants, and financial advisors.

What I do with them is I really work with them on helping them promote their business through public speaking—that's a major focus area of mine. I also do personal development sessions with people to help them get more focused in moving toward their goals.

I also listened to Robert Middleton's showcase presentation with you. It was really, I think, connected with you, George. I don't know what it was. It's something about your ability to put yourself across over the telephone [inaudible]. **0:06:08.8** And it looks like you've developed a system for establishing an initial contact with prospective clients and turning that into a long-term client relationship, and I would like to learn how to do that more effectively.

GEORGE: You're welcome. Thanks for sharing that, Sam; and we're going to do everything we can to help you get all that.

Who would like to go next?

CONSUELO: I'm Consuelo Davis and I am from Wichita, Kansas. And I've been an aesthetician by trade; and because everybody asks me if I'm doing a coach training for health and I help people to stay young longer not only with what they apply on their faces but what they eat. And my main focus is to help people get to eat more natural food.

And what triggered me to get into your seminar is I just finished taking the 28-day Marketing Strategy and I really loved it. So, I decided to keep on improving; and I think that you would take me to the next level.

GEORGE: Excellent! Welcome. Who would like to go next introducing yourself? Any takers? And some of you may be having trouble unmuting yourself. If you're on the telephone and you find that we can't hear you, there's a pin number that's in your control panel and I'm also going to email that to you. Let's see.

I've unmuted everybody who showed as muted. So, if anybody else would like to introduce themselves, that would be great. If not, we'll move on; and, if necessary, I'll mute everybody out again just to improve the call quality and have it easier for everybody to hear.

Anybody else who would like to introduce themselves? Okay, great! So, we'll move on. If you have a question, you can always put something in the chat box or send something through the question box.

Let me make sure that all the questions were answered before we start going here.

There's one quick question: Do you need to take notes?

Certainly, take notes. I find that when I take notes, it keeps my attention and I'm able to follow what's going on. Having said that, all these sessions will be recorded; however, I do recommend that you take notes because there may be some things that stand out for you that you want to capture without having to spend the time to go back and listen to everything. Either way is fine. I recommend you take, at least, some notes to help you stay on track and pay attention.

WENDY: I just want to say that I was on the call because having worked with you privately for several months now, I thought this would be a great extension. Going through this program gives me a set time on my calendar every week that I know I will sit and focus on this as I transition my business model.

GEORGE: Excellent and welcome.

Let's get rowing here. I'm going to mute everybody out as we proceed here; and if you do have a question, raise your hand or put something in the chat box.

Thank you, everyone, again! What you've really done is embark on mastering a fresh approach for providing great value to great clients. And, yes, extensively, it talks about getting paid to get clients but that's really not the main point.

I know and you probably know a number of people who are great “rainmakers,” that is, they're really fabulous at getting the attention of their prospective clients and cultivating those relationships. But they're super lousy at sealing the deal. They can't close the deal. They can't get people to actually buy from them and start working with them.

And if all you can do is attract attention but you can't convert that attention into paying clients, it's all for nothing.

Now, on the other hand, it's my belief, my experience, and my observation that if you're good at converting prospects into clients, it boosts your confidence into attracting prospective clients to you. In other words, if you don't feel good about converting clients, subconsciously, you won't want to do the things to attract clients because you know you can't convert them.

And so, being able to take clients all the way through this entire process of engaging them and having them become interested in what you're all about really stacks the odds in your favor of being able to have a consistent stream of clients.

So, this training is going to take you through a step-by-step approach to conducting introductory sessions that clients not only pay for but do so gladly. And don't worry. This approach works for free sessions as well; so it's well worth learning and mastering this approach.

So, having said that, all the verbiage from this point forward will focus on paid sessions. But if you're working on your free sessions, just insert the word “free” anytime you hear or see the word “paid.”

So, either way, for free or for a fee, this approach is a powerful way to really engage people and connect with potential clients in every single stage of your interaction with them; and one of the key things about this program is that it positions you as an expert in your field and it enhances your attractiveness to potential clients; and it boosts the value that you provide regardless of whether or not a client works with you in the longer run.

There are many things that you're going to learn throughout this entire program including how it's possible for you to really dramatically increase your conversion rates. It may be dramatic for you maybe going to 50 percent, 80 percent, 90 percent. And you're going to learn the most efficient ways to boost your revenue as well as your profitability. And you'll learn how to position your business that you work only with the best customers, clients, and patients while providing tremendous value to them.

And, by the way, when I use the word “clients,” just know that I also mean customers and patients.

You're going to get a lot of things out of this program and you'll learn how to eliminate tire kickers, how to get paid while you enroll clients in working with you, how to attract and select higher-caliber clients, customers, and patients, and how to make it easier to receive more and better referrals and make it more compelling for prospective clients to want to work with you.

And, in addition, this approach makes it easier for you to charge fees based on value and you get compensated well for providing that value. In my experience, it increases the length of your longer-term engagement; and it increases the lifetime value of a client to you. And it really clarifies and simplifies what can be a complex decision making process for a client.

It sets the context for value-based fees. You would definitely spend less time with tire kickers or eliminate them completely. And you waste less energy with tire kickers. And it virtually eliminates the risk of you being taken advantage of.

And, overall, your cash flow will increase and your success will expand.

So, you're going to work less hard to keep new clients and to get new clients; and you'll enhance positioning in your prospects' mind; and you'll boost your confidence in attracting better qualified clients and in getting paid what you're worth. And it's a way to showcase your expertise without showboating.

For some of you, it'll boost your confidence to go ahead and raise your fees and charge based on value rather than charging based on time or what you think the market will bear. And this will give you a boost to your marketing funnel; and I've said this before—your overall cash flow will increase and your success will expand.

So, at the end of this program, I'm going to give you a checklist of all these intended outcomes; and you'll be able to check off and see which of these outcomes you've actually achieved.

So, throughout this program, we're going to work intensively to super charge your client interaction and conversions; and, as a result, there's a good chance that you'll also accelerate your business growth in a number of other ways.

And how we're going to do it is through a combination of the step-by-step training I'll take you through, the real time coaching support, as well as the "get it done" virtual work days. And, where appropriate, I will be sending out and giving you access to recorded material. In fact, you'll be able to review all the material we're going to through in each of these training sessions, but there's some additional supplementary material that I'll have you study.

And, as you know, I'm a big huge fan and proponent of addressing all learning styles so I've addressed this program to address all learning styles and to enhance your brain's "performance envelope."

So, starting today and over the next six weeks, we'll have these live training sessions; and during each training session, I'm going to walk you through these specific steps you need to take as well as the sequence that I'll recommend.

So, each week is going to include a weekly mission, and the mission is like an assignment for you to work on; and, typically, the assignment is for you to develop a tool or a script that you're going to need for a particular aspect of the whole approach.

And so, mission one is developing your screening and intake process; mission two is how to think diagnostically; mission three is developing your discovery process; mission four is creating your Core Client Process or your signature system and designing your strategic session; mission five is the Mindset Upgrade—it's expanding your beliefs, thoughts, habits, and actions so you can be more effective not just with the *Get Paid to Get Clients* approach but in every other important aspect of your business development; and mission six is real world testing and refinement.

All this is good theory, good information but it doesn't mean anything until you go out in the real world and see how it works, and then come back and let me and let all of us help you to refine it and get it to work for you.

And so, along the way, you're going to develop your own natural selling process. Personally, I don't like selling. So, I had to develop an approach for myself that was non-selling; and this was how I developed this approach over time and refined it and continue to refine it as you will, too.

And so, you're going to find your style of getting clients to sell themselves on the possibilities that you help them to unfold.

Again, our live coaching sessions are Tuesdays, 9 to 10:30. Somewhere in the information, it might have said 10:15 so we'll go 9 to 10:15 or 10:30 depending on the length of material. All of these sessions will be recorded and they will be transcribed. These are the actual coaching session dates: August 30, September 6, September 20, September 27, and October 4.

I'm a lifelong student of expanding human potential and translating it into high performance. I recently stumbled across the book called *"Brain Rules: 12 Principles for Surviving and Thriving at Work, Home, and School."*

I highly recommend this book. It's written by a guy named John Medina who's a developmental molecular biologist and research consultant. Actually, he's from my neighborhood. He's from University of Washington and Seattle Pacific University. And he believes that understanding how the brain works can help us become better students and teachers and educators and parents and business leaders and human beings, overall. And I agree.

In each chapter of the book, he describes a brain rule. A brain rule is what scientists know about how our brain works and ideas on how to apply these rules into our already busy lives.

Rule number 5 is about short-term memory: Repeat to remember. So, information is best remembered when it is elaborate, meaningful, and contextual. And memory is also enhanced if that material is reviewed within 48 hours of that initial exposure.

And brain rule number 6 is about long-term memory. So, the way to make long-term memory more reliable is to incorporate new information gradually and repeat it in intervals. And that means you need to apply new information to ingrain and integrate the learning.

But so many of us are so busy that we haven't really developed the habit of consistently making our own business development a top priority; and so, our own business development whether it's marketing or developing materials or doing follow-up calls is really built on "I hope I get to it when I have some spare time." It gets relegated to the list of "hopefully, I can do it," and that's not a good strategy.

I had the same problem so I came up with an instant cure. For years, I've integrated this approach into my programs and they're virtual workdays. They're scheduled times at which you get work done. And some of my clients have told me that this was the best part of the program.

So, let me tell you how virtual workdays work.

Twice a month, everyone will get together for this session, [inaudible] **0:23:52.0** session. You get on the phone, you tell me what you're going to work on for the next hour or so; and if you have questions, I'll answer those. I'll take you through additional nuances of this approach. I'll help you troubleshoot your process and maybe do some role playing if that's what is needed.

Then, you go off and do your work; and then, you come back after an hour or so. You report on what worked, what you got done, and what you didn't get done. And then, you declare what you're going to work on the next hour; and you go off and get that done; and then, you come back at the, end and everybody celebrates your wins.

So, our virtual workday sessions are on the second and fourth Thursdays of the month. They're from 9 to 11 Pacific, and there are 6 sessions. And here are the workday sessions and, by the way, they're all on Thursdays except for the final one. The final one is actually on Tuesday, November 22nd.

And the reason I had to do that is because the United States' Thanksgiving is on Thursday, November 24th. So, we had to move it up to November 22nd. Make sure you note that on your calendar.

I'm going to share mistakes I've made along the way during the entire program, and you'll also learn things I've learned from teaching other people. And, of course, you will learn from each other.

And one thing that is going to get set up for you is an interactive forum. I didn't have a chance to set that up for you. I just thought of it last night and we're going to use probably the Yammer system that I use for a different purpose, but we're going to use it for our purpose to create a little support community amongst all of us.

And you'll be able to post questions, and I'll be cruising those questions and answering those; and other people will have a chance to chime in as well.

At this point, let me unmute the lines and let me see if you have any questions for me. If you have a question, go ahead and speak up or you could raise your hand. Either way is fine.

If there are no questions, we'll cruise right ahead.

In case you're wondering, with your control panel, over to the right, you'll see where you can post a question here. This is a surgery troll that one of my very first patients gave me when I started my plastic surgery practice in case you're wondering—who is that character?

So, raise your hand, there's this icon right here if you have a question. You can raise and lower your hand by hitting this button here.

This control panel, if it's in the way of you seeing, just hit that orange arrow and it will expand or contract your control panel. And, if for some reason, your presentation window mysteriously disappears from your screen, look at the very bottom of your computer screen and look for this orange kind of cauliflower icon, and click on that, and your window will expand again.

By the way, with me saying how great paid sessions are, there are some disadvantages. Here they are:

They are an additional hoop for people to jump through. I think that's a good thing.

There is a lower sign-up rate for your strategic session because it's not free. I think that's a good thing as well.

And there is higher resistance to your initial discovery session. That's a good thing. You want to have higher resistance because you only want people who are committed and eager and energetic about moving forward.

One real disadvantage of paid sessions is that it may not be appropriate in all situations; in which case, you simply use the same approach but you just don't charge a fee and you'll still be able to deliver “knock your socks off” value using this methodology.

So, these are disadvantages that are not really disadvantages. They're desirable features of this approach.

So, many people want to know what's best, free or paid. And the real answer is they're both good. I recommend that you develop both a paid and free approach for your business toolkit.

Now, here's the best part about paid sessions. I've come to realize that the best part about the *Get Paid to Get Clients* methodology is it's really the opportunity for connecting with people. So, the approach that I teach is not about the money contrary to the title of this approach and all the other educational materials that I've produced about it.

The title is really just to get your attention, and it's true! You do *get paid to get clients*. But the heart of this approach is that throughout the entire process, you're focused, first and foremost, on

being of service. You're developing a connection with your prospective client. It's a connection that deepens every step along the way.

And so, if that one-time client who pays you for that initial session turns into a longer-term client, you're really starting off on solid ground; and it gives you a tremendous opportunity to go deeper faster and to help that person in producing greater impact.

And so, even if that one-time client does not turn into a longer-term client, you're still providing value; and you'll never know if and when that value might come back to you.

For instance, last year, I did a paid strategic session with a client and she talked about working with me longer term after that; but for various reasons, it never happened.

A year after I worked with her, that very one-time client referred her neighbor to me and, guess what? Yes, I offered a paid session to her neighbor and she turned into an ongoing client who is worth tens of thousands of dollars to me.

So, let me give you the 60,000-foot view.

There are distinct phases to this approach and there are distinct steps. So, phases are broader, in general, and consist of groups of steps; and, yes, there are specific steps I will walk you through.

Let's do the 60,000-foot view. So, you're all familiar with this in some shape or form; and you're going to have access to a password protected site where you'll be able to get the recorded trainings and also download all the handouts, worksheets, templates, scripts, and examples. This client-customer-patient flow chart will be in that password protected area.

I'm just showing this to you to give a reference. It may make you a little cross-eyed right now. We're going to go into this in greater detail in the next few images.

So, this is the general sequence or phases of how a client flows through your business. And if you can think of it structurally, it will help you to break down the process here and really understand how to take this on step by step rather than being overwhelmed.

So, the first phase is the attraction phase. So, a client finds out about you somehow, ideally, through your best and strongest lead generation mechanism. Then, you need to take them from a potential buyer to a paying buyer; and the way you do that is to go through the discovery or exploration phase to see, “Hey, are they a good fit for you? Are you a good fit for them?”

Then, you go into the conversion phase where you see if they're a good fit for you and they determine if you're a good fit for them; and they turn into a paying client.

And then, you go into what I call, for lack of a better word, the “consumption phase” or the “delivery phase” which is where you deliver your value through your Core Client Process,

through your signature approach. This is where you're working with your client to do what you do best.

So, in this attraction phase, you're using your lead generation process. It may be through getting referrals or speaking or writing. Maybe they come to you through articles; maybe they come to you through the internet.

And then, back to the discovery exploration phase, this is where you're going through … with the initial exploration, you're really screening people out and you're also leading them to your strategic session. So, there's an initial fact finding mission that you're on in the initial conversations. Don't worry. I'll take you through the specifics of this.

You're really taking them through a pre-qualification process. They may or may not know that because it's seamless. And then, you're leading them to your strategic session.

So, when you go through this fact finding process, you're carrying this out in your initial conversations. And these conversations could be live; they could be in person or by phone or even through internet instant message chat or email. I've done all of these.

And when you're pre-qualifying … I like to use the intake form, the snapshot questionnaire which you're all now familiar with because you received the very one that I use in my business. And then, you go into the strategic session.

I want to give you a little sidebar here on the strategic session in and I'll emphasize this later on, but this initial strategic session, whatever you do, do not call it an introductory session. Do not call it a sample session.

And I use “introductory” simply for the sake of training and also for getting people interested in this approach because it's what people commonly use. But in real life practice with real prospective clients, you don't use the word “introductory” or “sample.”

“Introductory” sets the context for people wondering and raising eyebrows and saying to themselves, “Well, what are you introducing me to?” And so, you set up an initial resistance even though it may be unconscious for them. And I think “sample” is best reserved for chocolates, not a sample of what you offer.

So, pick a different name. You can use strategic; you can use diagnostic session; you could use a whole host of other names except introductory or sample.

I want to say one more thing about your strategic session. In your strategic session, you're pointing out what the clients need rather than what the clients think they need or want; and you're summarizing recommendations into a strategic plan.

And how I'm going to show you how to develop your strategic session is you're going to develop your Core Client Process or what's called your "signature system" and you will integrate that. You will weave that into your strategic session. I'll show you how to do that in subsequent training.

Your strategic session needs to end up being a road map for people. It's a road map for accelerating their business growth if they're in business; it's a road map for accelerating their personal and professional transformation, if you're working with them on a personal level. It gives them the game plan, a place to focus, and a confidence in their direction. You need to help them organize their thoughts, strategies, and ideas into cohesive pathways.

And here's the important thing … the context of the strategic session. It's focused on the needs of the client—their agenda, not your agenda.

A lot of people think the strategic session is an opportunity to sell something. And that's a different methodology. That's not the approach I'm teaching you here. And there's an appropriate time and place for that kind of approach; but, again, that's not the purpose of what I'm teaching you.

So, what are missing from most initial sessions are the two keys to turning your initial prospect into a converted, full-paying client. And that is, most sessions do not provide a tangible outcome and real value.

A lot of initial sessions that I've been part of or that I've seen in training are fluffy. I'm going to teach you how to provide specific, concrete value and help people get real outcomes from it.

So, if you haven't figured it out already, the key to successful paid introductory sessions lies in understanding how to provide tremendous value during that initial session; and it's a value that the prospect or client (they're now a client because they're paying you for that session) sees is well worth paying for.

And, again, during your strategic session, part of your job is to clarify their options per proceeding and help them to simplify what may be a complex and confusing decision-making process. Clarify and simplify for them.

And so, when you get into the conversion phase, as you help them work through the decision-making process, you're helping them to really determine if it makes sense for them to become a longer-term client with you.

And then, of course, you go through your logistics, the paper work that you have when you sign a coaching agreement. And I'll give you examples of that later on.

Then, in the consumption phase, that, of course, is when you start working with them using what you do best. So, let's just quickly review the flow:

It's client attraction—client discovery—client conversion—and then, client consumption.

Next, I'm going to take you through the 10,000-foot view which is the general sequence of steps. But, first, let me see if you have questions. I'm going to unmute everybody. Let me see what kind of questions you have.

Does anybody have any questions so far or any questions you want to put in the chat box?

JUDY: George, it's Judy. I have a question. During the conversion phase or maybe it's more during the discovery phase, are there ever times where you really can't quite figure out what it is that the person needs?

GEORGE: Yes. Actually, that happens earlier on. When I send out that initial snapshot, that gives me a good sense of whether or not this person knows where they are or if they're completely lost and everything else in between.

And if they're lost, then, that snapshot gives me the opportunity to go back and ask them questions to clarify. And if after clarifying they're still lost, then, I have to make a decision about whether or not it's worth investing any additional time or energy into engaging with this potential client.

Does that help?

JUDY: Yes, it did help.

GEORGE: And we'll make it more concrete. Right now, I recognize that this is all very theoretical for most of you; and when you actually start using this in your business, it'll start to come together.

Any other questions?

CONSUELO: I have one. In the third one where you talked about client conversation phase, the commitment and the registration process, is that when you tell them that you charge because, normally, what they've been training me is that you give a free consultation?

GEORGE: Yes. You'll see when we get into the training of this aspect how to introduce the fee. And, yes, this is where you tell them that one of the recommendations you have is to do a strategic session with you; and the fee for the session is blank, blank, blank and what they get from the session is blank, blank, blank.

And, yes, I know that a lot of people are taught to do free sessions. And, again, it can work but I've worked with a lot of people who have come out of various coaching academies and have various certifications; and I've had to untrain them from what they were taught because it's very limiting and it limits their ability to work with better higher-end types of clients and it limits their income potential.

Other questions? Okay, I'm going to mute everybody out again and we will forge ahead.

So, here's the 10,000-foot view.

We just came out of the 60,000-foot view. Now, we're in the 10,000-foot view, and I'm going to take you through the general sequence of steps for this methodology. And keep in mind as I take you through the steps that this is a linear …

I guess the best way to describe it is that there are steps to take in a certain order. Depending on the circumstances, you may change the sequence of steps; and the sequence of steps may change because of where the client is, where you are in your engagement with the client, and your own personal style.

So, Step 1: The potential client contacts you or you contact the potential client. This can happen live in person, by phone, or by email.

Step 2 is you arrange an initial "get acquainted" conversation. Again, that may have happened in Step 1 already. The alternative is you could start an email dialogue. I've done that as well.

And Step 3 is you carry out your first brief, touch-base conversation.

Now, Step 4 is after Step 3, that initial brief, touch-base conversation, if it's appropriate for moving forward, you have the client fill out a snapshot questionnaire or a web form. And if it's not appropriate for moving forward, you let that client know and potentially direct them elsewhere.

Then, the next step is the potential client completes and returns the snapshot questionnaire. You, then, in Step 6, review the questionnaire; and you identify areas for further inquiry and formulate specific questions.

Then, you go to Step 6. So, you pose those additional questions to the potential client usually by email although it could occur by phone. Most of the time, they do it by email.

And then, Step 8, you schedule another touch-base conversation to clarify or explore any areas of interest or concern that you've identified from their responses to that snapshot questionnaire.

This leads us to Step 9: Conduct that second touch-base conversation usually by phone although I have done it by email; but my recommendation at this stage especially when you're learning it is to do it by phone.

That leads us to Step 10. If in that second touch base conversation, and these are really brief conversations of 10, 15, or maybe 20 minutes at most, if you judge this contact to be a potentially good client, customer, or patient, then, you invite them to participate in a paid strategic session.

And Step 11, you conduct your strategic session. Again, it can be in person. I've done that. It could be by phone with or without screen sharing. That's what I do most of the time.

And Step 12, at the end of that strategic session, you summarize your recommendations for moving forward. This may or may not include recommendations for working with you. It may actually include other resources that may not have anything to do with you.

Step 13, you determine the fit of the client for working with you; and if the fit is good, you're really looking to read their level of commitment for working with you.

And Step 14, if the client is committed to moving forward and working with you, have the client complete the client agreement and registration information. You schedule that initial session and recurring sessions moving forward.

And then, you move on to Step 15 which is you begin working with your new client using your Core Client Process, otherwise known as your signature system.

I know these are a lot of steps. There may be some steps that blend together when you do this in real life; and I just wanted to give you that 10,000-foot view.

Don't worry if it doesn't make total sense to you if you don't have it memorized. I don't expect for you to have that down pat.

What I am going to do right now is take you through greater detail, through the specifics of the first four steps.

So, Step 1, that is, initial contact with your potential client. And, again, your initial contact with a potential client, customer or patient may result from either them contacting you or you reaching out to them.

And if your potential client approaches or contacts you first, that initial contact may have been live or by email or phone. If you initiate first contact with your potential client, this may also be live or by email or phone. They all work.

And depending on the circumstances of this initial contact and the nature of the conversation, this first contact may suffice as the initial conversation that I talked about in Step 2.

And Step is 2 is to arrange the initial "get acquainted" conversation. Again, this initial "get acquainted" conversation can occur in person, by phone, and/or by email or a combination of these.

If your initial contact is in person, then, that initial contact may be the very "get acquainted" conversation that gets the attention of your potential client and leaves them wanting to get more information from you.

If that initial contact is by phone either a live phone call or a voice mail, then, you'll jump to Step 3 as well as if the initial contact is by email.

So, in Step 3, this is your "get acquainted" conversation. This may be a continuation of a live conversation where you met, say, at a networking event or you met at a party or another social gathering. And so while this initial "get acquainted" conversation may be relatively brief, it naturally and comfortably leads people to the next logical step.

So at this stage, the key thing you want to accomplish is to literally get acquainted, learn a little bit about their background and why they've chosen to contact you or engage in a conversation with you at this particular time. You're trying to find an angle. You're trying to find out what makes them tick and what their pain is or what their desire is.

And also during this initial "get acquainted" conversation or email dialogue, you really want to understand … of course, their name that you'll have at this point; their business, if appropriate; their website, if applicable; how they learned about you; what they're looking for help with; and what's really motivating them to contact you or to engage in dialogue with you at this particular time.

And during this initial conversation or email dialogue with the potential client, you'll get a sense, at least, at a superficial level, whether the client is a potential good fit for you.

Now, of course, you probably don't know enough about them or their situation at this point; but, at least, you can determine if it's worth exploring the relationship further.

So, at the least, by the end of your initial "get acquainted" conversation or dialogue, you should be clear about these things: 1) Does this prospective client have a big problem or a burning desire? 2) Am I or are you the potential answer to their big problem or burning desire? And do

you get a sense that this is someone that you'd enjoy working with? Or do you get the hibbie jibbies? Do you get bad vibes already?

And, as a general guideline, you can spend 10 to 15 minutes at this stage of the relationship; of course, if you find them particularly interesting and you have that time, by all means, continue that conversation.

I've taken, sometimes, 45 minutes at this stage but usually because we're talking about other things like parenting or playing tennis or some other piece of technology. I just want you at this stage to be mindful of your time and energy so you don't waste it with someone who just isn't a good potential client for you.

And so, there's a sample script for this initial "get acquainted" conversation. It will be downloadable for you when we give you your access to the password protected site. You should have access to that sometime tomorrow.

And what I recommend you do … it's a Word Document. You read through it and you just use it and mark it up, adapt it, change questions on it, and change the sequence of questions to make it appropriate for your style and your particular business.

And there are some recordings that you're going to hear. You'll hear a role play about how I do this initial "get acquainted" session. And I also have a recording for you about what not to do and what not to say during your initial "get acquainted" conversation.

So, as part of this initial "get acquainted" conversation, you're going to invite your potential client to fill out a snapshot questionnaire or redirect them elsewhere. And you only invite them to fill out this snapshot questionnaire if you think and feel it's appropriate and worthwhile to explore the relationship further. Otherwise, you just tell them you can't help and redirect them elsewhere, if appropriate.

So, Step 4: You send your potential client your snapshot questionnaire or a link to an online form with the same information. So, this snapshot questionnaire can be in the form of a true questionnaire with questions on it and a place to fill in information. Or it could be a checklist. And a well-designed snapshot allows you to concisely, efficiently, and conveniently obtain initial key information that gives you an appropriate high-level understanding of your potential client's present situation.

You can deliver the snapshot questionnaire or checklist to your prospective client by either emailing it directly to them or directing them to an online form on your website. And you can also have it so that after they fill out the web form, the results get emailed to you.

And if you're offering business services, programs and products, here are some sample snapshot questions. If you're working with people in life development, I have a different set of snapshot

questions. But here are the ones if you're working with people in their business or offering business services, programs, and products.

So, you want to find out who their target audience is and what geographic region they serve. What are the main issues, problems, and challenges that their clients seek them out for? In other words, what does their company specialize in?

And what are the services and programs and products that their company offers? What do they want to be known for and who are their best clients? Who is attracted to their products and services? And who do they really want to attract?

What are their one-year and three-year growth goals? And how many leads do they generate every month? Where do their best clients come from? What's their average prospect-to-client conversion rate? How long does their average client work with them?

Now, if you're offering personal services, programs, and products, then, you want to find out in the snapshot from your prospective client what are some of the most important changes they want to experience in their life? What are some of the biggest challenges they're looking to achieve? What are some of the ways they're looking for help?

What have they tried before, if anything, to address their current issues and concerns? And if they got their issues handled, how would they describe what their life would be like one year from now or two years or three years from now?

So, in the training site, there's a sample questionnaire. Basically, it's the very questionnaire that I sent to you because I want to get this information from you; and I want to understand your particular situation, your goals, and your challenges. It will help me immensely in working with you in this program

And so, if you haven't received the questionnaire, send an email to Jill at freedompreneur.com. She'll send that questionnaire to you. If you have received that questionnaire, please fill it out and get it back to me.

And here, you'll have an example of a snapshot questionnaire that's in the form of a checklist. This is a real questionnaire that one of my clients uses. You'll have access to that example.

And then, there's an online snapshot that I have; I don't really use it often. But you can go to the site right now—freedompreneur.com/snapshot—and you'll be able to take a look at the online snapshot that I have.

So, on to your mission—Mission number 1.

Your mission is to develop your screening and intake process; and, in particular, I want you to develop your snapshot questionnaire. You can use the examples that I have shown you and that

you'll have access to. And the thing to do is take what exists and make it your own or, of course, you can start from scratch. Either way is fine. I just want to make sure that you create this questionnaire.

And the thing is, don't worry about making it perfect because it will change. I mean, I've modified my snapshot over the last few years; and I continue to see how I can make it better, to see how I can make it more efficient for me and for the client.

In general, you want to include about 10 to 12, maybe 15 questions. You don't want it to be so long that it's onerous and it's daunting for your client to fill out.

So, if you get beyond, I think, 18 to 25 questions, then, all of a sudden , it becomes like "oh, my gosh, that's a lot of work to fill out" and you may get resistance just because of the sheer volume of information you're asking for.

So, this is just designed to give you a high-level read of a potential client's situation. It's not designed to be comprehensive or encyclopedic.

Let me pause here and I'm going to unmute everybody, and I want to see if you have questions about putting your snapshot questionnaire together. So, everybody is now unmuted. Let me also check the question section.

So are there questions about creating your snapshot or the mission or any of the steps?

I know this is a lot of information; and that's why, I wanted to just give you the overview and we're breaking down the steps into manageable bites.

JUDY: Hey, George, this is Judy. Do you ever use something like SurveyMonkey for the questionnaire?

GEORGE: No. I have used SurveyMonkey for other purposes. I've never used it for the snapshot questionnaire. Having said that, could you use it for that purpose? Let's think real quickly.

JUDY: I'm wondering about confidentiality, too, and security.

GEORGE: It's usually not an issue because if people find out about this kind of information, I mean, what are they going to do with it? It has not been an issue for my clients. I haven't been worried about it.

When working with a client, you're going to be sending information back and forth, and you can wonder about the security about that system. If you're in a business where high-level security is an issue, then, you'll need to be using an email server that has a secured email system; and those are available.

Some of my physician buddies, when they're sending emails back and forth to patients, they use that kind of system. So, if you have that need, I'll find out what that system is. But, in general, I've just not run into that.

But let's answer your question. SurveyMonkey, could you use it? They get the link to SurveyMonkey, and they answer the questions. Yes, you could use SurveyMonkey for this purpose, if you wanted to.

I just find that creating a Word Document and sending it to them or having it some place where they can download it is just much easier for me; and I don't have to pay for SurveyMonkey.

But if you like SurveyMonkey, test it out. See if it works. I don't have anything against it. I, frankly, just never thought of using SurveyMonkey for this purpose.

Other questions?

By the way, I just thought of one other thing. When you create your snapshot questionnaire, you want to keep it simple in terms of its visual presentation, but it does have to have a professional presentation.

No, it does not need to be professionally and graphically designed. If you want to do that, that's fine. I've no problem with that. But if you look at my questionnaire, it's nothing fancy; but it's clean; it's simple; and you can figure out where you should fill in the blanks. That's all it needs to do.

You don't need to impress people with the beauty of your snapshot questionnaire. But don't confuse people or give yourselves a bad image by having an ugly-looking questionnaire that's confusing and has grammatical errors and just lousy formatting.

Other questions?

SAM: In terms of getting people to return the questionnaire, I know you can send them a snapshot questionnaire and they get busy with other things, how do you facilitate the process of actually getting it back in a timely manner?

GEORGE: If they do not return the snapshot questionnaire, the first thing I will do is I'll just send them an email to make sure they got it. An email is not a hundred percent reliable. If I've sent them a link or told them about a link, I'd still follow up with them with a quick one-sentence email or a two-sentence email and make sure that I gave them the right link and/or that the email with the link came through.

That's step number one. You don't ever want to assume that they already have the access to the snapshot.

The second thing is if you've confirmed that they have the snapshot, frequently, that follow-up reminder is a tickler for them to fill out the questionnaire. Sometimes, they get busy and they forget and so forth.

If you know and you've confirmed that they have the snapshot questionnaire and they've not returned it, I don't do much beyond that. As far as I know, they have the snapshot; they've acknowledged it. I don't do anything, in general, to get them to fill out the questionnaire because my philosophy is if I have to chase them down for the snapshot questionnaire, I'll question how motivated they are to move forward.

And so, if they do not fill out that snapshot, then, the screening process has worked.

Does that make sense, Sam?

SAM: Yes, it does.

GEORGE: Other questions?

CONSUELO: This is Consuelo. What about like, for instance, in your questionnaire, you asked about your business name and what kind of clients you are presently serving. And if you have none of that, do you just put zero or …

GEORGE: If you're filling it out for me, absolutely, yes! Tell me you're brand new. Tell me you have no clients and no revenue. I mean, sometimes, you're brand new and you have a client or two; you're making a little bit of money. That's fine.

I do want to see your snapshots, of course. When we get to the virtual workdays, I'd like to be able to review these snapshots and help you to make them better.

Other questions?

Let me give you the next dates for the coaching sessions. I know some of you told me in advance that you needed to leave early. Our next live coaching session is on Tuesday, September 6, next week. And our very first virtual workday is Thursday, September 8. That's from 9 to 11 Pacific.

Back to your questions! And when we're done with your questions, I have one question for you all. It's for my own [inaudible] **1:07:29.2**

So, is there anybody who is concerned about their ability to take this on? Are there any fears or concerns that are coming up for you? Does it seem like too much, too overwhelming or too whatever?

No, great! So, let me check the question box one more time.

I have a question for all of you just to give me feedback. What I'm wondering is … I'm so close to this approach that it's hard for me to see other perspectives. In fact, for a long time, for years, I really didn't think what I was doing here was any big deal. I didn't think it was anything unique. I was just doing what I naturally needed to do from being a surgeon.

So, when I started training people in this approach, I kept thinking, wow, gosh! This is so obvious. I mean, why do I need to train people? In fact, I had a workshop where there were 150 people registered live to go through this training.

And I remember the night before, I called up the person who was helping me to produce the event; and I said, "Why are we showing up tomorrow? Why do I need to show up tomorrow? This is obvious. It's so obvious; I have nothing to teach people. Why are 150 people showing up tomorrow?"

And she said, "George, let me tell you something. This is not obvious. And just because it's obvious to you doesn't mean it's obvious to other people."

So, my point in telling you that story is that now that I realized it's not obvious to a lot of people and now that I realized there are a number of steps and nuances to this approach and I've trained probably hundreds of people at this point in this approach, my question is this:

With the system so powerful in that I reviewed for you many of the advantages of paid sessions and the outcomes you're going to get from using this approach, my question to you is why don't more people take this on? Why don't more people adopt this approach?

And it's a real question because I don't know the answer to that. I have my own ideas but I don't know what the real answers are. So, I'd like to get feedback from you about why would someone not take this on.

JUDY: George, are you interested in hearing our comments right now?

GEORGE: Absolutely, if you're willing and if you have the time. Or if you can't think of anything, email me later; but I really want to know because I think that this could transform the world and help a lot of people's businesses and help a lot more end clients. And I want to find out how to better reach the people who could use this approach.

JUDY: I'm going to share with you my thoughts. I think it's because a lot of people are uncomfortable doing that much screening upfront. That's been my own personal experience. I think there are certain business owners that you have to just kind of go through doing the interviews and working with clients who are less than ideal. And once the pain gets to a certain level, you start realizing that you just don't want to deal with it anymore.

I know for myself that that was a big thing. I went through a long period of doing free sessions and working with clients who just weren't a good fit. And now, in my business, I feel like I'm ready to do it. I'm really ready to get great clients and do some upfront screenings.

But I think it takes some trust and maturity to get to it.

GEORGE: Right!

JUDY: That's my own take.

GEORGE: Judy, thank you for that. I'm feeling a little bit sobered over here because you have confirmed one of my greatest fears. And I thought about this a few weeks ago, and I think that with this approach … people who have experience in the field like the school of hard

knocks, I think, will understand very quickly how this is a powerful approach and be more likely to gravitate to it.

My fear is that new people … and, Consuelo, I acknowledge you for taking this on as a newbie because my fear is that new people will be so excited after coming out of a coaching academy and being taught "oh, you just do a free session and you have all the clients you need and you have a waiting list," they'd be so new to the business that they won't understand … they won't have the experience of the pain of how hard it really is to get clients.

CONSUELO: Do you want me to tell you what I'm thinking?

GEORGE: Yes, please.

CONSUELO: I will tell you A, B, C. One of the things, I think, no matter what the age, has to do with change. People are horribly afraid of change. And the system is that you give free consultation and everybody is doing that, so you've got to do what everybody is doing.

And you are offering something totally different. You're taking us out of the comfort zone because we're going against the water, I guess, if you want to say it that way. And it's going to take time for people to realize that you really have to be good and know what you have.

You're really sick and you go to the doctor. You don't qualify the doctor. He doesn't screen you. He just takes you.

GEORGE: Right!

CONSUELO: So, in this business, you're telling us that what we have is valuable and we're not giving it value. So, we have to learn to value ourselves, and then give that to people. And we would be better coaches, I think, by learning how to value ourselves. I think that's what you're going to teach us.

GEORGE: Absolutely! You nailed it right there.

CONSUELO: But it's going to take time because people have got to see everybody in your class progressing, and then they want to get in. It's just [inaudible] **1:14:07.9**

GEORGE: Well, you got me fired up, Consuelo. We're going to start a revolution here.

CONSUELO: I don't know if you've got this book. It's called *What It Takes To Change the World*. It takes one person. And you can be that one.

GEORGE: Yes, that's the revolution that's going to start … that has started. Actually, it started two years ago when I started teaching this approach to people. And I think it's accelerating. My sense is that, energetically, it's accelerating.

KAT: I think one of the other things that people are fearful of especially as a new business owner or one that has been struggling is they're afraid to [inaudible] **1:14:59.0** any business. They're afraid they're not going to have enough income. And so, they feel obligated to take on every client that calls them in case they don't get any calls for two weeks. I think that's part of it, too.

GEORGE: I don't know how to get people through that because, paradoxically, this approach, if people adopt it even from day one, it's going to get them more business; and they'll make more money; and they'll be more profitable. And, yet, I understand that fear. I've got to think about how to reassure people about that.

Well, thank you for that feedback. This part for me was very helpful in terms of understanding how to communicate with people about both the power and the challenges in taking on this approach and having people to really appreciate the value of taking this on.

We will reconvene next Thursday which is September 6 and, again, on September 8 which will be Thursday.

In the meantime, if you have questions for me, feel free to contact me. You'll be receiving information about user name and log in to get into the training center and also for getting into the Yammer network so we can have an ongoing dialogue and forum.

With that, thank you, everybody, for a great first kick-off session; and I look forward to working with you moving forward; and I look forward to working with you next Tuesday.