GEORGE: Welcome, everyone, to *Get Paid to Get Clients* Acceleration Program Training #3. Again, as usual, we have a lot to cover. Just quickly, some logistics. If you want to submit questions throughout the training, you can do so using the question box. If you have a chat question for either me or Jill or you want to chat with other participants in the program, you can use your chat box which is actually different than a question box.

And, of course, if you want to raise your hand, I may ask you periodically to raise your hand just to gauge a vote of 'yes' or 'no' or interest levels, then, you just hit the yellow hand. And, then, sometimes, you'll need to move your control panel out of the way, and so you can use that orange arrow to open and close your box.

And then, probably, more commonly, sometimes, the presentation disappears and you can look for it in the lower part of your browser by looking for that orange power; and then, click on that and your window should come back.

So, today's agenda … I want to see if there are any questions left over from last week or that have come up from last week. We'll do a quick review of where we've been so far; and then, I'll take you through the next steps in the *Get Paid to Get Clients* sequence; and then, we're going to dive in to developing new skills and creating new tools. And then, you will have your next assignment which is Mission 3.

So, to kick off, are there any questions that I can answer?

TIMOTHY: I had a client that I met with last week who told me that he had a referral, which is wonderful news. So, basically, he told me that he was going to meeting with each individually over the next week or two, then working with me. How would you recommend my following the path of information with it?

GEORGE: I would make sure to essentially do a mini training with him about what he might say to this particular referral source. I would help him to understand what he ought to say about you. And, in short, it's pretty simple. I would have him share with the client—what kind of issues, problems challenges was he dealing with before he started working with you? Why did he choose to work with you? What kind of work did you do together or are you doing? And what kind of results has he gotten, received or produced since he has worked with you?

TIMOTHY: So, you'd hand those questions to the referral source before me connects with the individual?

GEORGE: Exactly! In the normal course of conversation, probably, the individual will say, "Why did you choose to work with him?" which is one of the questions, hopefully, he would have answered. But if you give him those four questions, it gives a solid framework for any other questions that come down the pipe.

The other thing is you should train your referring client on what to do next which is—should you get the potential client's contact information by telephone or email? Do you want your referring client to set it up so that you're going to contact this potential client, which would be my preference?

Have your client go, "Hey, if it's okay with you, I'm going to give Timothy your contact information and make sure he contacts you. Would that be okay?"

And, on very rare occasions, the person will say, "No, I'd rather contact him." But that's pretty unusual. In most cases, they're glad to have it made easy for them.

Getting a referral is a whole another separate training, but I'm giving you the crash course here. And it actually ties in with Mission 3 to a certain degree. We're going to be talking about your core client process. And having a solid core client process makes it easier for other people to refer to you and makes it easier for people to describe what the heck it is that you do to other people.

I think that will get you 99 percent in the right direction.

TIMOTHY: I was at a restaurant with someone briefly and one of my clients was sitting next to him and described what I do, and the man turned to me as we were leaving; and he said, "I need a coach," and he didn't have a card. He couldn't give me his contact information so I gave him my contact information. I can't get his contact information from somebody else. But the question is how long do you give him to reach out to him versus me reaching back to him?

GEORGE: In the case that you don't have his contact information directly, I'd probably give it about seven days. In the future, and this happens frequently where they don't have a business card, I'd take out two of my business cards. I'd give him one of mine and then I'd take down his contact information onto to my business card. In that case, I would follow up within three days.

I would give it several days, say, five to seven days; and if you haven't heard, then, I would track down his contact information.

Let's go through a review of where we've been, and then get on to new material.

With started out a couple of weeks ago with a 60,000-foot view of this approach, and you all should have this handout by now; it's in the Mission 1 material in the training center; and this is how a client flows through your business.

What I did was we went through the different phases or sequence of the client flow. There's the attraction phase which is lead generation; and then, there's discovery exploration phase where you're in dialogue and interaction with the potential client; then, there's a conversion phase where they are determining whether you're a good fit and you're determining whether they're a good fit for you; and then, there's the consumption phase wherein you're actually doing what you do best which is work with the client and help them to get the results that they're looking for.

In the client attraction phase, there are a number of ways to attract a client. One, as Timothy pointed out is referral; another is speaking and writing, networking, strategic alliances and joint ventures or affiliates; and, of course, internet and social media.

And, interestingly, the approach that you're learning will help you in all of these phases. It will help you in the client attraction phase as well as the conversion phase and also the client retention phase.

After the attraction phase, you move to the discovery exploration phase and that's where you are working for … you're information gathering; you're fact finding; and you're doing your preliminary qualification.

And, ultimately, if it's appropriate, you move into a strategic session; and, in this case, I'm teaching you how to offer a paid strategic session. But, again, this very same and identical approach can be used for free sessions.

I've spoken frequently about a core client process, and that is actually going to be the emphasis of what we'll work on today. Your core client process must be integrated into your strategic session; and, ultimately, you'll give clients a strategic road map for how to get from where they are now to where they ultimately say they want to go.

And you will also use your core client process, your skills, your wisdom and experience to help guide clients through what can frequently be a complex decision making process. You'll help them to clarify what their options are and, as I've said, simplify their decision making process and make it easy for them.

In this conversion phase, you're helping clarify what the issues are, you're helping to address concerns on natural human resistance; and once you get through that phase and you both think and feel it's a good alignment, then, you move into the actual logistics of completing the necessary paper work, client agreements, and moving on to actually delivering what you do best

through using your core client process. This is what you call "client consumption"—using what you have to offer.

And here's the entire sequence in one fell swoop. So, that's the 60,000-foot view. Then, we went through the 10,000-foot view which is a closer view, and we went through different steps. And this is where your eyes may go cross-eyed. Again, you have this map in your Mission 1 training material.

This looks like a linear process; and, in general, it is. But there are some times where you skip steps or you go out of sequence. And understanding when to go out of sequence comes with practice and experience.

Last week, I took you through learning to think diagnostically just like a doctor or a detective; and I took you through the approach to diagnostic questioning; and your mission where we left off last week was to develop your approach to diagnostic thinking and questioning.

In particular, your assignment from last week was to simply create an alphabet soup of questions that you could ask your client. It didn't need to be in any particular grouping of sequence, just a bunch of questions.

And where we left off as far as the specific steps of the *Get Paid to Get Clients* sequence is we got all the way through Step 7, and Step 7 is to clarify specific areas of interest and/or concern that you glean from the snapshot. And you clarify these by contacting your potential client.

As I mentioned last week, you could schedule a second brief conversation or do this by email. And as I said last week, many times, I'll ask short, quick questions by email because this turns into a back and forth email dialogue and it goes a long way towards cultivating the relationship, developing trust and familiarity with you; and it really shows that you care.

So, now, on to Step 8:

In Step 8, what you do is you schedule your second brief touch-base conversation. And so, at this point, you've reviewed the information from your potential client's snapshot and you have clarified the areas where you had questions. You've done that either by phone or, more likely, by email. And now, it's time to arrange another brief touch-base conversation.

Technically speaking, if all goes according to sequence, this will be your second touch-base conversation. And you'll, more than likely, carry this out by phone which is what I recommend. I think it's possible to do this by email, and there may be situations where you carry this out by email. But for your purposes of starting out and learning this, I strongly recommend that you carry out this second brief touch-base conversation by phone.

Now, in this second brief touch-base conversation, depending on the number of questions that you have and the depth of your potential client's responses, this second conversation could last anywhere from 10 to 15 minutes. I think a decent target range is around 15 to 20 minutes.

I have gone as long as 30 to 45 minutes and that's by intention. Frequently, in these touch-base conversations, I go off on a different tangent unrelated to the reason that they contacted me to start with. Sometimes, we'll start talking about tennis; sometimes, we'll start talking about parenting or some other interesting topics simply because I'm just interested in talking to people.

That's why there's such a range. However, for the business end of things, your goal and intention is to truly keep this a brief conversation. You don't want this conversation to turn into a free session. You don't want to do that.

In fact, the other day, I was talking to, I think, somebody in this program who was saying that what she does is a free session; and then, she offers a paid session. And I was thinking, no, no! Don't do that. That defeats the purpose and the power of the program.

In the training center under the Mission 3 material, we will have a sample script for the initial part of the second brief touch-base conversation. And it's a very simple script. I won't go through it right now because it's in a Word Document for you.

Just let it suffice to say that during this conversation, during this second touch-base conversation, you want to keep your ideal client criteria in mind and engage how this potential client meets those criteria during this second brief touch-base conversation.

What I'd recommend that you do is print out the ideal client criteria that is in your Mission 2 training material. Have that by your desk. Have that in front of you during your conversation.

And, if during the second touch-base conversation, you deem it appropriate to offer and invite them into a paid strategic session, then, simply transition into introducing and recommending that they go through a strategic session with you. And I do have a sample script for you as well but we'll talk about that in Step 9.

Also, in the training center, there will be an audio role play for you of Step 8. Then, we move on to Step 9.

In Step 9, this is where, during that second brief touch-base conversation, you invite your prospective client to participate in your paid strategic session. And, remember, you only do that if you think it's appropriate. If you think that this is a potentially good client, customer or patient, invite them to take the next step.

If it's not an appropriate potential good client for you and it could be for any reason they may not fit your client selection criteria—they may not be ready, in your opinion, for moving forward; there may be other things they need to do or sort out—then, point them in another direction.

When you're having this conversation that invites them into the strategic session, what you communicate to them must be factual, but it also must be compelling enough for them to do be excited and enthusiastic about participating and engaging in your strategic session.

So, here are the key elements that you must convey in your invitation to your paid strategic session.

The first key element is the intended audience. So, you need to describe who the strategic session is designed for. For me, the strategic session is designed for entrepreneurs who really are gifted and they really want to make the most of what they have; and they're hungry; they're eager; they're motivated; and they're committed to turn their great potential into great performance. And that's what I help them to do with the strategic session. I get them pointed in a powerful direction.

The next thing you want to do is explain what it is. You can use this as well: "The strategic session is a 90-minute long session where we explore the issues you're facing, your goals and dreams, what's in your way and various options available to you; and, ultimately, you'll end up with a clear road map for moving forward." If this fits for your strategic session and it probably does for 99.9 percent of your situation, then, use this verbiage.

You also want to describe to your potential client … in the invitation to the strategic session, you want to describe how it works. So, you want to paint a picture of how the strategic session is structured. It might go like this: "First, we'll spend time going through the challenges you're facing now, and then I'll give you some suggested alternatives to what you're doing now."

You also need to clearly explain what they'll learn; and so, in terms of the pain or problem that is their issue, you want to describe how your strategic session addresses that pain or problem and what they're going to learn along the way.

What they're going to learn and the outcomes and benefits are two distinct things although there is overlap, and you want to be very intentional and specific about clearly communicating the outcomes and benefits of your paid strategic session.

Think of it this way. Tell them how they'll benefit in terms of specific, measurable results, improvements, outcomes, and experiences that they'll get from this session.

You also, of course, need to communicate price. So, what I'd recommend you do is that you price your strategic session so that it's attractive and affordable enough to potential clients but it's a high-enough price point to weed out the tire kickers; and the pricing needs to be such that it's

worth your time to deliver. And you have to also make sure that you feel confident stating the price.

I recommend that you have a guarantee. What I say is, "I'm so confident you'll gain tremendous insight and value from the strategic session that if you don't agree, I'll give you your money back without any hassle." I strongly recommend having some sort of guarantee for your session.

In the training center, there's a sample script for introducing your strategic session. It goes through all the elements that we just went through. What I'd recommend you do is open up that Word Document and either use it as is and/or modify it for your purposes.

I have also in the Mission 3 materials a short audio that discusses how to go about selecting the best client to work with.

This is my reminder. When you are speaking about your strategic session, don't call your session an "introductory session" or a "sample session." I know that's commonly done. I know it's commonly taught to offer a "sample session." You've probably heard me say this before: Samples are for chocolates.

Even though in my marketing materials I call these sessions "paid introductory session" and occasionally, you might see that here and there, that's because I'm speaking the language of my audience. I'm meeting my potential buyers of the *Get Paid to Get Clients* approach where they are using the language that they understand. So that's why I call these introductory sessions "paid introductory sessions."

But when I'm introducing my session to a potential client, I do not use "introductory" because it raises the subconscious and conscious concern about, "Well, what are you introducing me to?" And it raises their guard.

So, give it another name. Call it a strategic session; call it an assessment; call it an evaluation; call in a diagnostic. Call it something attractive. Ideally, have a benefit-oriented word in it and call it anything except "introductory" or "sample."

Okay, I think I've beaten that point into the ground.

Now, we're going to go into the core client process. So, your core client process is your proprietary step-by-step methodology of your approach to working with clients. It's your signature system. Think of it as your unique approach for how you deliver your services and products.

And, more importantly, your core client process gives people a sense of structure in how you deliver value, how you work with clients and help them to achieve the results, improvements, outcomes, and experiences that make it worth working with you.

Your core client process needs to tell a story of how you take them from where they are now through all the steps, the twists and turns that they need to take to get to where they say they want to go; and your core client process also gives people a view of your unique view of the world.

Now, here's the thing. In general, clients don't care about your process. They don't go looking to buy a process. They pay you for outcomes. Yet, having a clear, solid core client process is vital to your success. It's vital to your ability to provide value and, ultimately, to your profitability.

And as important as the core client process is, paradoxically, creating, delivering, and articulating your core client process is commonly overlooked. In fact, I've never seen it taught anywhere.

Now, if you've seen it, I want to know. I'm curious because I would like to see what other people are doing and see other angles. But, again, I've not seen this taught anywhere else.

And the reason we're addressing it is because, as I mentioned earlier, your core client process is a vital component that's critical to the effectiveness of your strategic session.

As I also mentioned, once you've laid down the essentials of your core client process, you'll begin to see how it's also an important ingredient in all of your communications with clients and potential clients. It's an important ingredient in all of your verbal, written, and visual communication about your business and about the value that you offer.

I've talked a lot about core client process. It's kind of getting you pumped up. By show of hands, would it be helpful for you to see an example of a core client process? Just raise your hand and let me know.

Let me show you an example from a client of mine. I've got a client who has a 5-step core client process; it's called the "Prosperity Pathway." And this is what it looks like on their website. Here's a little description of their Prosperity Pathway; and then, the five steps follow below. They follow below the description.

I'll take you briefly through it so that you can get a feel for how this is designed.

So, Step 1 is to explore which is exploring the seven principles of prosperity that they have and to learn how to apply these principles to accelerate their client's abundance. And here are their seven principles of prosperity that were referenced in that step.

And Step 2 is to envision; and that means that "you'll benefit from our prosperity profile tool which gives you a macroeconomic view of your current personal economy." It gives you a big picture, in other words.

And then, Step 3 is to embark which is to build on discoveries from Steps 1 and 2 and take action to improve your economy.

And Step 4 is to execute using the Prosperity principles to choose financial products that complement the ones that you may already have.

And then, Step 5 is to expand so that you gain experience in applying the Principles of Prosperity to your personal economy. Your financial confidence should increase; and then, your view of possible investments should expand.

So, this is their 5-step core client process. It's concise. People can follow and understand it. People can get a visual from it.

Let's take a look at my own core client process. Mine has evolved over the years through working with hundreds of different clients. Yours will, too. So, let's go through my own core client process as an example of how you might model yours and maybe you'll get some ideas.

So, let's do this as a role play. That way, I can show you my core client process as if I might respond if somebody asked me what I did.

Are there any questions before we go forward?

JILL: We have a lot of questions.

GEORGE: Okay, let's address those then. This is a decent time to address those.

JILL: Jamie's first question was, can you define core client process? Which, I believe, you've already done. So, Jamie, did that answer your question for you?

JAMIE: Yes, some of my questions including "George, what's your core client process?" but, now, we have that on the screen. You have this terminology, core client process, and that's nice. We should label everything; but it doesn't say anything to me emotionally. I guess the role play will help.

GEORGE: Core client process is really an internal term. Just think of it as your step-by-step signature methodology.

JAMIE: But even there, you're using a lot of jargon—methodology and this and that. And you're saying everybody is this individual but, of course, if … we went through it fast with the example. But trying to see it quickly, it's like, alright, they have an article with seven steps and part of the process is to go through it with them. In basic layman's terms, that's part of their process.

In other words, most of our processes are based on things that aren't so special. Everyone does them. Maybe it's the way we put them together.

GEORGE: Yes!

JAMIE: Okay, because I wasn't sure if … you know, do I have a core client process? I handle different things that I do with clients differently. So, I'm confused about that but I have lots of other questions, too.

GEORGE: Let me say something about that one, Jamie. Yes, there are things that you do that everyone else does. However, everyone has a particular style. Everyone has a particular slant to how they do it. And that's what you want to showcase with your process.

JAMIE: It's not just saying, "Oh, there's some coaching," but to showcase what you do that's special. I think the role play will …

GEORGE: It will, and I've had the advantage, everyone, of seeing Jamie's website. And I told her the other day that her core client process is in the website. It's just buried so people can't figure it out, but it's there.

JAMIE: Yes, even Jamie can't figure it out.

GEORGE: She's too close to the tree to see the bark.

JAMIE: I need the picture that's in your webinar [inaudible] 0:35:37.2 what my core client process is.

GEORGE: Yes. I'm here to help you figure it out. That's the point of today's training; and moving forward, you will continue to do the work and I do have my ways.

JAMIE: I want to back track a little. You're talking about these touch-base conversations and by the time all of these conversations are done, I would have spent as much time on them as I currently do on the free sessions. So, why is this different? And then, I have follow-up questions about this process.

GEORGE: Great! That's an excellent question and it's a valid concern. There are a number of reasons why this approach is still more efficient and effective.

First of all, in your touch-base conversation, you are cultivating a solid platform for your relationship before rushing in to even a free session. Secondly, there's a tendency when you get into a free consultation or a free session to go way, way, way over time. And the next piece is that when you're in these initial touch-base conversations, it's part of the pre-qualification so you're figuring out whether or not to invest any time or mental energy or emotional energy in dealing with this potential client.

And the intensity and energy involvement in having these brief, casual conversations is different than in a free consultation. Look, if you're doing your job right when you're providing a consultation or a strategic session whether it's free or paid, it takes energy; it takes thought. It takes energy to listen.

I'm not saying not to put energy or to be thoughtful or to listen to the brief, casual conversations; but casual is casual. There's just not as much energy from you.

JAMIE: Okay, some of this may just be me but how do you keep the conversation short? Just because they're targeted, people will start rambling; and if I ask the question about, let's say … if I'm probing deeper into what kind of books they wrote before that didn't sell, they're going to want to talk to me for an hour about how they wrote their books and the plot. I'm afraid it'll never end.

GEORGE: Yes. So, part of this is practice and even before you get to the practice phase, part of it is the design of your snapshot. So, if you design your snapshot properly, it's going to pull out those questions; and if they decide to, if they choose to during your touch-base conversation to rehash those, you just say, "Yeah, I got those from your snapshot," and you move them on to the next question. You have to be directive in these touch-base conversations.

And you set the context before you start the conversation—"Hey, I've got to go in 15 minutes. I just want to touch base real quickly."

JAMIE: Okay, but I know how that can actually backfire a lot. Anyway, what do they think they're doing in these touch-base conversations because if I'm listening to see … "Oh, no, this is not an ideal client; this client has $10 and doesn't want to spend anything and is not ready." What do they think they're doing by investing their time answering my questions? And then, how am I going to redirect them and say, "You know what, I'm not gonna offer you anything, in fact, because you're not appropriate for my business" Now, you're in deep doo-doo.

GEORGE: No, not really. You still can provide value. Off of that snapshot, you should be able to discern whether they have 10 bucks in that fit. And if you find that this is not an appropriate client for you to work with after that snapshot, you can still direct them to resources. You can offer for them to buy some books from Amazon. Get started there or send them to some website.

Or this is where to start: "Clearly, you don't have the money to invest a lot but this is where I would start given your situation." Boom! Give that to them.

And you could do that in an email, if you want to. "Hey, I've looked at your snapshot. Here are some resources for you. Start there." Done!

JAMIE: This is a little bit of a jump but can you say more about the difference between what they'll learn and outcomes and benefits like specific examples?

GEORGE: Yes. It's an important distinction and there's overlap. So, it's a good question to bring up, Jamie.

The easiest place to start is outcomes. The way I think about this … I actually write this out on my mind now or a sheet of paper. For my program or whatever I'm offering, what are the concrete outcomes you're going to get? And I'll write out this line—specific measurable results; and I'll start listing out what results they could get.

Then, the next line I'll list is what kinds of improvements? Fewer headaches, fewer calls in the middle of the night, whatever it is!

Then, I'll list out—what are the "outcomes?" Like what's a result? I mean, there's an overlap between outcome and result so let's not getting into semantics.

But then, the next thing I'll write down is—what are the experiences? What are the emotional experiences that people will get?

And that's how I think about it. I start asking those questions.

JAMIE: Okay, and then what do they learn?

GEORGE: What will they learn? Then, I'll write out—what are some principles that you're going to learn? Then, I'll start thinking, okay, given whatever I'm offering—a product, program or service—what are the underlying basic principles that people need to understand? What are the approaches and processes that they need to learn?

Here's an example. You will learn how to communicate the value that you provide in any conversation that you have whether it's five seconds or 15 minutes.

I just described how to integrate your core client process in any conversation that you have. I just didn't call it that.

You will learn how to eliminate a hundred percent of the tire kickers who knock on your door or a hundred percent of the people who waste your time. You will learn how to get more referrals

than you can handle. You will learn the most efficient and effective ways to work with only the best high-end clients.

So, when you're trying to do this for yourself, just create the words, "you will learn how to," and then, fill in the blanks.

JAMIE: Okay, but there is like a crossover with that?

GEORGE: There is.

JAMIE: If you learn how to work with high-end clients, an outcome also is if you'll be working with high-end clients.

GEORGE: Yes, but what's so great about working with high-end clients? What's the outcome of working with high-end clients?

JAMIE: More money.

GEORGE: More money, more satisfaction, greater contribution, more freedom for you, a greater value provided—I mean, the list goes on.

JAMIE: I'd like to think about outcome and benefit as tangible but, actually, the tangibles are the learning. It's a semantic thing that I'm getting caught up in …

GEORGE: I understand. Believe me—I had to work through this myself.

JAMIE: I think outcomes are like deliverables, but these are the sort of highfalutin greater value satisfaction, and what you learn is that there are key principles so it's much more tangible.

GEORGE: What you learn is what?

JAMIE: It's more tangible.

GEORGE: For sure, there's an overlap. But the distinction is that the things that you will learn are principles in best practices. The outcomes are something very specific—more money, better relationships, more free time, less aggravation. These are things that you can, in general, measure either quantitatively or qualitatively. They're measurable.

Experiences are measurable. You can say, "Hey, on a scale of one to ten, how was your last vacation with one being low and ten being high?"

"It was the best vacation I've ever had. It was an eleven." Great! That's an outcome.

JAMIE: Did anyone ever ask for their money back?

GEORGE: Not a single person has asked for their money back.

JAMIE: How long have you been offering the money back guarantee?

GEORGE: From the beginning, even when I was fumbling through getting this to work. I've been offering a paid strategic session for four years.

JAMIE: Well, those are all my questions for the first half hour.

GEORGE: Those are all great questions, very good questions. Judy has a question. Yes, Jill?

"Do you actually put this in writing?"

I don't have a problem putting it in writing. I don't have this anywhere on my website. If I found I needed to, I would certainly put up a page about my strategic sessions. I just haven't needed to so I don't.

I don't have anything against it. It's not a strategic reason that I don't put it up on my website. So I would have no problem putting it on my website. If I'm emailing to somebody about the strategic session, if I think about it, I'll put it in the email. But, for sure, I tell them verbally.

Jill, other questions?

JILL: I think we're done on questions now. You have two volunteers to role play.

GEORGE: Okay. We have Wendy and Timothy; and Jamie volunteered.

JILL: Timothy, too.

GEORGE: Does anybody have a three-headed coin? Let's go with Jamie. Let's set the scenario up here. Let's look at this way, Jamie. Let's say you are … you can be you and I'll be me. And you can make up a situation or you can use a real life situation in terms of what you're dealing with in your business. And, eventually in our conversation, I'll show you how I weave in my core client process into whatever thing you bring up.

JAMIE: What sort of service do I think I'm going to …

GEORGE: It could be nothing. You may even know nothing about what I do. Let's say, we met at the …

JAMIE: Initial contact.

GEORGE: Yes, let's say, we have initial contact. I don't know. You tell me where we met. It can be anything. It doesn't even have to be a business situation. Let's say, we met at the airport.

So, we're waiting to get on the plane or whatever. Maybe, we're on the airplane and we're just having a conversation.

JAMIE: Well, I hope the airplane has Wi-Fi.

GEORGE: There you go. It probably does.

JAMIE: That's the beginning of my end. I'm role playing right now.

GEORGE: Yes, I'm finally able to log in here after the flight attendant was helping me to get logged in. What are you up to?

JAMIE: Well, even taking a flight means several hours when I'm not tethered to the office.

GEORGE: Why does that make you nervous? I'm kind of curious because I can tell we understand what you're saying. I feel like I need to be doing something.

JAMIE: I just cannot handle the admin aspect of my business. You have your own business, too?

GEORGE: Yes.

JAMIE: Well, how do you handle your admin?

GEORGE: In the past year, year and a half, I finally figured out how to work effectively with an assistant. I used to be a lone ranger for so long, it was driving me crazy.

JAMIE: I don't want to be a lone ranger anymore.

GEORGE: I wonder if your business is conducive to that. What kind of business do you have?

JAMIE: I work with writers who are having trouble finishing and polishing their books.

GEORGE: Oh, okay. Yes, you know, that's a huge problem.

JAMIE: Well, that problem I can solve. I can sit down and write a book. I published 10 books. That doesn't bother me, but when I look at answering emails and going in the back end and fixing things, maintaining the website, following up, doing a mailing list—it's like I'll just go broke if you don't get a handle on that.

GEORGE: Ahh! Well, you know, what I figured out and it took me a long time like years to figure this out is that I was trying to handle everything just like you—emails, phone calls, all the logistics and administrative things and bookkeeping, all the things that are not part of my wiring and not the things I do best, but I can figure out.

And what it did is it actually defocused me. It took my focus away from the things that I really do best and that I should only be doing and that no one else could do.

JAMIE: That is exactly what I feel, that I can do it but it's not part of my wiring.

GEORGE: Exactly! You're bright enough. You can figure it out and be competent but it still doesn't mean you should do it. And so, I just had to come to the realization that I have certain strengths; and I have certain blockers; and I should just focus on my strengths.

JAMIE: How did you figure out how to hand over the rest of it?

GEORGE: I had to look at how my business is structured. See, my business was structured for me to be a lone ranger with no Tonto. And I actually wrote out some different business models for how to build my business so that I could focus solely on my strengths and everything else could get handled by other people with different processes.

And so, my strategy was to hand off certain pieces not like creating a massive shock for me but in a way that was more gradual and comfortable for me or comfortably comfortable. And so, my strategy was to work this on over time.

And what I actually did was I developed documented systems for the things that needed to get done, that I shouldn't be doing; but if they were going to get done by somebody else, I needed to feel confident that they were being done on time and to specification and that they're being done right.

So, I actually documented my critical systems, not every single thing. And I actually wrote down like, what are the skills that I have that are critical that I should be using? And what are the skills that I have that I should not even be touching any longer? Right, you know what I mean.

JAMIE: Step away from the email.

GEORGE: Step away from the bookkeeping.

JAMIE: The bookkeeping, that's the thing. I went to do taxes the other day and I have double entered a lot into QuickBooks. And so, I'm spending like I made x amount and I did not make x amount.

GEORGE: Yeah!

JAMIE: I mean, you have systems, really? What do they look like?

GEORGE: Well, in the most basic form, they're checklists. In some forms, they're flow charts; and other times, it's a combination of a flow chart and a checklist and descriptors like written out texts.

I haven't done this. But I've also had clients who have actually video recorded their systems. That's part of their documentation.

JAMIE: What kinds of clients do you have?

GEORGE: Oh, my clients are all kinds. They're entrepreneurs. They're gifted entrepreneurs and they're super talented, they don't always understand how to package and present themselves. So, I help them to put the whole package together so they can be comfortable and make the contribution that they're here to make.

JAMIE: Oh, that sounds like something I'd be interested in.

GEORGE: Well, we could explore that some more. I think the key for you, Jamie, is for you to figure out and to carve out what you should be doing and where and how to get support for the other thing.

In that way, you'll be able to move forward, like take action, with greater confidence knowing you're doing what you should do and everything else is being taken care of.

And, of course, you need to have a way to make sure that people are doing their job, and that you're doing your job, and that you actually follow through on what you say you're going to do.

JAMIE: I'm so overwhelmed I don't even know where to start with that.

GEORGE: Well, you know, here's what I'd suggest. I'd like to ask you some more questions and probably the best way for me to do it is just to give you one of my snapshots so I can get a quick snapshot of where your business is.

JAMIE: What's a snapshot?

GEORGE: Well, a snapshot is just about 10 or 15 questions and I can ask you here since our plane flight is about 8 hours long.

And I'd take it from there. So, let me show everybody what I just did. If you look at the screen, this is my core client process as it appears on my website. There's the first part of it and here's the bottom half of the web page.

And if you look, you'll see that I started describing for her … I took her through every single step of my core client process. I just wove it into the conversation. I talked about strengths and blockers, focus, and strategy, and structure, and systems, and skills, and support, and action, and accountability, and follow through.

Did it sound mechanical to anybody?

JAMIE: No.

GEORGE: No, it didn't.

JAMIE: It did not sound mechanical but I gave you lots of opportunities to jump in sooner than you did.

GEORGE: Of course, you did.

JAMIE: So, did you deliberately resist or did you resist because we're role playing or …

GEORGE: No, I deliberately …

JAMIE: To make sure that I was hungry enough to pursue.

GEORGE: Well, I needed to make sure that you got my total view of the world. I'm saying to Jamie in my mind, "Jamie, this is how I see the world. This is how I'm hearing you and reflecting back to you what I hear. And this is what I sense is going on."

So, I wasn't going to move forward until I felt comfortable and confident that I heard what was going on for you in terms of your pain, that you heard from me, that I heard your pain, and that I had a way for you to get out—some ideas, some suggestions.

I didn't flood you with everything because I had a lot more that I could say about it; but I was very deliberate in what I said and what I didn't say.

So, I'll tell you what. I could have said, which would have totally blown you away … look at the next slide.

See, I use my core client process which you will learn, too, as well, in my strategic sessions. You will see those keywords and key phrases … I'll repeat it. This is a map that I use when I take someone through my strategic session. And during a session, I expand that map to this level and there are other levels to my map.

So, I could have gone on and on and blown you away by going down these different topics; and I intentionally did not because I know you're overwhelmed. I know there's a lot that's swirling in your mind; and you're anxious because you're on an airplane and there's no Wi-Fi.

So, Jamie, let's just hear from you. What was your experience of our conversation?

JAMIE: I look at the chart you have up now and I'm like, "Oh, I need to get that chart." But, you're right. If you had tried at any way to give me any of that, I would have just exploded because I was too overwhelmed. And so, it was a very gentle approach which was actually good and it forced me to take the step forward.

We were role playing. This was, as I'm sure you can tell, a real scenario. And so, I'm aware of the role play. At the same time, I'm like "Hey, I do want that answer. Come on, tell me the answer."

GEORGE: So, it painted a picture of possibilities for you, didn't it?

JAMIE: Yes.

GEORGE: It created intrigue. It created interest.

JAMIE: Yes.

GEORGE: And I don't do that in a manipulative way. I do that in a way that's like, okay, well, this is how learning occurs. This is how progress is made because you gain interest. There's something intriguing that you see. It's for you to follow, right?

JAMIE: I can see that this is one of those six things about the ideal client. I forget which one, but you want to see that they're ready and willing. They know they have a problem. They're ready to do it. And so, instead of you saying, "Yeah, I deal with it" and I'm like "Oh, really, that's so nice for you," you get me more intrigued. And so, I step forward. And then, I'm the one who clearly wants to take it another step.

GEORGE: Exactly, right! So, in a moment, I'm going to take you through key elements to designing and articulating your core client process.

First, Jamie, thank you for volunteering to go through this; and thank you, Timothy and Wendy, for volunteering as well.

I want to let you know that this role play conversation that we did has happened in real life for me many, many times. And I don't know if I shared this story with you but I've gotten clients from conversations where I had no idea that I was going to get a client from it.

I called a bookkeeping service once to try to talk them into doing my books because I knew they were busy and they were full; they had more clients than they could handle. And my sole purpose of that conversation was to have them become my bookkeeping service. By the end of

that conversation, not only were they hired on as my bookkeeping service but they were also hired on as a client of mine.

In a nutshell, what had happened was they were reticent to take me on because they were so busy. They didn't have a way to train new bookkeepers and get them on board and up to speed. So, I said, "Oh, that's what I do. I help people to create systems that are documented that people with a baseline level of skill, experience, and expertise can go to that system, learn it, retrieve it, and with minimal input from the outside be able to run the system and produce minimally acceptable results, decent results with it.

And then, the bookkeeping owner said, "That's what I need!" and I said, "Well that's what I do." And she said, "When do we start?" I said, "Next week, and you've got to take me on as a client."

And all I did was have this conversation. And that's happened more than once. I can tell you other stories on how this has happened to me.

Timothy, if you say you got in that conversation, tell me what didn't work.

TIMOTHY: Well, I understood what you two were doing. There just seems so much more information in that conversation than needed to be. It seems like it could have been much shorter.

GEORGE: If possible, for sure.

TIMOTHY: It seemed it would be drawn out and I kind of got lost with Jamie and all of the things she was … I mean, she was talking about all the other things that were not working for her but … maybe I got overwhelmed by the amount of things that weren't working for her. Maybe that was it. I don't know.

GEORGE: Yes, because there are a lot of things that weren't working. And so, yes, you may not go through every single thing; you might not address every single thing that someone brings up. You may key on just one or two things.

Part of this is an energetic read on what you should key in on.

TIMOTHY: I need some clarification there because, personally, I don't know that I would have let that go on for so long. And Jamie even said, "I gave you a lot of windows here to kind of stop me," but it just seemed like it was so much and maybe you needed to hear all those things.

GEORGE: Yes, exactly! And, you know, you make a good point because, in some cases, I might not have let Jamie go on as long as she did; but I knew we had an 8-hour plane flight. She seemed interesting. She seemed interested. And so, part of it was discernment; and that kind of judgment comes with experience.

TIMOTHY: Right! She probably wanted all of her problems solved by the time the eight hours were over.

GEORGE: Let me take you through the key elements of your core client process.

The first element is creating informative descriptions. Your descriptions need to be interesting. They need to give people clarity. And you need to give people a structure or a framework, something to sink their teeth into; and there needs to be a flow between all the different elements of your core client process.

It doesn't have to necessarily be sequential although it could be, but there needs to be flow from one to the other. Let's go into this in greater detail.

So, descriptions tell a story, and your descriptions should be a concise statement of principles or best practices or philosophies or beliefs or your approach to problem solving and implementation, something like that. And your descriptions need to tell a memorable story that resonates with your audience.

It should be conversational, meaning that it's natural; it's clear; it's fluid. And what I mean by conversational is that in an actual conversation, it should be conversational. I've seen people be mechanical and rote with it, and that's not what you want. But it should also be conversational in tone when you present this in writing or even visually.

It should be jargon free. It needs to paint a picture of possibilities for your potential client. And, where possible, it should be ideally outcome-oriented.

Structure leads to function; without structure, there's no function. My favorite analogy here is about human anatomy. Let's say I fall down on my knee hard and I get a lot of bruising and swelling and even bleeding. So, I've damaged the structure of my knee.

And for most of you, you probably I'm a tennis player. So, immediately after that injury, how well do you think I'll be able to go out and play tennis?

The answer is not very well. And so, because of a damaged structure as in my knee, my function is impaired, right? But in the world of entrepreneurship, the vast majority of people are out there running around without any sense of structure and they wonder why things aren't working.

So, the solution, in my observation, is for them to become information junkies. But all the information in the world never has and never will make any difference. Only application of that information makes any difference. Practical application of information leads to functionality. It leads to results.

So, you must provide structure for your client that leads to functionality. And in your core client process, I want you to build in structure. I want you to give people the sense that there's a format; there's a framework; there's a container, not a container that limits but a container that provides a foundation, a platform, a container that supports function and possibility.

Think of a tree. So, the anatomy of a tree is such that there are roots; there's a main trunk; and then, there are branches coming off of that tree. And those anatomical elements create order; it creates stability; and it creates functionality for that tree.

So, if you think of the "anatomy" of your core client process in terms of knees and trees (it wasn't anything I made up on purpose but it makes my point), give your client a basic structure for them to hang their leaves on. When you can do this, it gives them reassurance. It helps them to see their blind spots, actually; and it helps for your potential clients to build their confidence when people can see order and they can gain insights.

They'll think something like, "Hey, you know what, I can follow that structure. I can follow that container. I see what you mean."

So, in my experience and observation, providing a framework has a calming, soothing influence. It gives you that platform for you being more secure and confident of being a source of inspiration and hope and possibility for people.

And in the absence of any framework, you'll end up being what I call an "entrepreneurial amoeba." So, if you recall from high school biology, an amoeba is simply a single cell organism that's essentially a blob. It has no set form because it has no supporting skeletal framework.

And I don't recommend blobbing your way to success. I suppose it could happen but the odds are against it. So, think structure.

Having said this, there's no "one size fits all" template for crafting models and frameworks for your core client process. Think of this in terms of a framework for telling a story as if you were

writing a story. Provide your audience with reference points within your model; and see if you can use models and frameworks to help reveal blind spots for your client.

And let me show you some examples of a visual model. This is a visual model that I use. I pull it out at certain points in my strategic session or, sometimes, I'll draw it out on napkins in the middle of an impromptu conversation.

This model is an example of business functions. I call them "success engines." So, I tell people, "For you to be successful in your business, there are four engines that need to be rubbing at the same time.

One engine is leadership management and team building; the other engine is operations or logistics and administrivia; the next engine is marketing so that's promotion and education as well as sales so those are kind of two engines in one; and the final engine is the deliverable—so, what are your products programs, and services?"

Another visual model is what I call the "kitchen table" model. These are what I call "lines of service and [inaudible] 1:12:37.7 delivery." So, I tell people, "Think of a kitchen table." In fact, sometimes, I'll have people draw this out. Draw a stick table and draw legs underneath.

And under one leg, write the word "coaching." So, coaching is providing guidance, advice, direction, support, cheerleading, resources; but you're not part of the actual "getting it done."

Now, consulting, in my mind and in my definition, is providing all the things you're doing with coaching—cheerleading, resources, support, direction, and advice. And also, as a consultant, you're part of getting things done; you're part of the implementation team.

A coach is on the sideline; a consultant is on the field with you.

Under the next leg, I have people write "training." So, training is one to many—like today, we're doing a training; there's one of George and many of you. Training can be live. It can be virtual. It could be with 10 people. It could be with 10,000 people.

Then, under the next leg, I have people write "leverage." So, leverage is taking your coaching, consulting, and training experience and expertise, taking that material also known as "intellectual property" and leveraging it by turning it into recorded materials, information products, licensing, training other people to use your methodology, membership sites, and things like that.

So, that's another model I draw for people.

Here's a model by my good friend and colleague, Robert Middleton. This is a marketing ball model. It's modeled after baseball but it's marketing. He's got home plate and what it takes to get to first base and second base and third base and home plate. And so, this is something that

can be readily drawn out on a napkin or on a chalkboard; and it's very easy to describe and it's easy for people to visualize.

Now, the third element of your core client process is flow and flow provides continuity. So, whether it's online or in your written material, visually or verbally, the presentation and packaging of your core client process must have an ease about it. It can't be stiff or academic. It must be fluid.

So, each element of your core client process must naturally interconnect with each other and that's why you need to practice this. You need to practice using it, writing it out, and speaking it because along the way, you'll learn how to refine it and you need to be able to dance with conversations when you're communicating this to people.

You need to learn to be responsive and to listen at the same time that you're telling people about and describing your core client process.

Literally, we could spend another several weeks just working on integrating and infusing your core client process into your thinking, your speaking, and your writing so that it's seamless, natural, and effective; and, actually, that's what you will be doing—practicing integrating your core client process.

So, one little quick note: In the examples I've given on core client process, it may seem that there's linearity to it; and, indeed, there is for purposes of diagramming it. But in the real world, it's non-linear because, sometimes, you'll jump from one phase or one step to another. But don't worry about whether it's linear or non-linear.

A few more ideas about flow: So, whatever you say, it must be engaging and intriguing. It can't be dry or boring or rote as in mechanical. If you're going to give people steps like Step 1, Step 2, and Step 3, again, keep it conversational.

For instance, on your website, you may list your core client process as a sequence of steps but it still needs to give people the sense that there's fluidity to it. It's not so rigid that people can't follow the sequence, or else they're toast.

So, extensively, in this particular training program, I'm focusing you on applying your core client process to integrating it with your strategic session. But as I've said before and I'll keep emphasizing this, your core client process must be an integral part of each phase and each step of your client interaction from the very first introduction all the way to working with them.

So, play the role in client attraction, client conversion, obviously, client retention, and even getting referrals.

I know this is a lot of material. Your mission is to create your core client process or your signature system. I've put a lot of thought into how to help make this an easy process for you and I think I've come across how to get this to work.

So, what you want to do is get out a blank sheet of paper or write out the elements of your core client process on index cards or get out a Word Document or my favorite approach which is to use my mapping software. And then, what you want to do is think of your best client or think of a best client and start thinking about what you did with them. Start thinking about what kinds of questions you asked them.

And I'm going to borrow a technique that I learned from writing books; and, that is, anytime you get "writer's block," instead of staring at a blank screen or a blank sheet of paper and fretting about having writer's block, what you do is you start asking questions. And, in fact, you can actually write out these questions; and then, you answer those questions; and in the process of answering those questions, you will free yourself from writer's block.

So, what I've done for you is I've created a core client process worksheet; and it consists of something like 20 questions that you can answer that will help to draw out the elements of your core client process. Let's see if I can show this on screen. I'll give you a flavor of what some of the questions are. And then, we'll take some questions from you.

Some of the questions would be: What's the first question you usually ask a potential client or a new client? What's the most revealing you usually ask a potential client? What are the critical things you need to know to make a "diagnosis"? And what kinds of questions do you ask to obtain that information?

Do you have a questionnaire or a survey, quiz or profile that you have them complete? If not, would you like to? And if you do have one, describe it.

Don't worry about taking notes. This worksheet is going to be available to you in the Mission 3 material.

How do you go about helping a client turn chaos and confusion into order? What kinds of visual or descriptive models and frameworks do you have to draw out what would help your clients learn and gain clarity?

What questions do you have or do you ask to find out what your clients' real problems are? What kinds of visual, auditory and/or sensory triggers tend to get your clients' attention or get them angry and frustrated? What are the blind spots that your clients commonly have?

And there are a few more questions here. I'll let you go through those through your worksheet. So, just take this worksheet and answer them; and it'll help to bring out key elements of your core client process.

One little tip here: My 100-year-old yoga master … you've heard about him. He's a former World War II fighter pilot. He's always repeating to me to that repetition is the key to mastery.

There are nuances to this core client process that are important. And to really build all these pieces that I've shown you in today's session into your core client process, you really have to immerse yourself in it and commit to writing out these elements and being open to refining it on an ongoing basis.

My own core client process … I've continued to add to it. I see nuances to it that I didn't see six years ago when I first wrote down the first elements of it.

So, you may feel overwhelmed right now. All you need to do is start answering the questions on the worksheet I'm giving out to you; and I'll help you in the virtual workdays and these training sessions to put it into a semblance of order.

And, at a certain point, what I'd recommend you do is call up some trusted friends and practice on them. Describe to them your core client process. Or you could get a practice buddy. That was what I used to do when I was first learning how to market and sell. I had a practice buddy and we would practice selling each other. And it helped us to get a lot of the bugs out of the system.

And the reason I recommend that you practice this is because you need to deliver your core client process with clarity and make it easy for people to follow.

Delivering your core client process in a conversation is like a dance. And dancing takes practice.

But when you can articulate your approach with clarity, it just makes it easier for other people to be clear themselves. And when you're clear, it really makes it easier for people to be attracted to you from a business standpoint.

But when you're muddy or unclear or confusing and chaotic, you can actually become repulsive or even destructive. And that's why I say you can't confuse people into buying from you.

Our next coaching session is next Tuesday, September 13. Our next virtual workday is Thursday, September 22nd.

With that, let me take questions from you. Jill, where should we start, the written questions or open up the line?

JILL: It looks like Jamie has a question here. Go ahead, Jamie.

JAMIE: Some of the links aren't working on the website and some of the materials from last week isn't available and there's no reporting of the virtual session. So, I wonder when we could get this recording.

GEORGE: Jill, can you address last week's material. I haven't looked recently. What's there and what's not there?

JILL: Everything is out except for the transcript of the session.

GEORGE: We haven't gotten that back from the transcriptionist.

JILL: I can put up the virtual workday that I did not put up but I was sending it to individuals who asked for it.

GEORGE: Just go ahead and put that up in the training. I guess you'll have to create a separate page for that.

JAMIE: And then, there are links that don't work. You created a different sort of name page when we log in now. It's like it's directing you to different aspects of your program but you click the link and it brings you back to the same page.

GEORGE: Jill, can you troubleshoot that?

JILL: Jamie, I might have to give you a call after this session just to see what you're talking about because I don't quite understand what you're saying here.

GEORGE: The documentation, the scripting, and the worksheet … Jill, I'll get it to you and just have you put it up today even before the recording gets there.

Timothy has got a comment about me pushing everybody. Yes! That's part of pushing the envelope and that's what we're all doing here so that we can be more effective at delivering our gifts.

Thanks for that jab, Timothy.

Other questions?

Everybody should be live. Any questions that you have?

JAMIE: The core client process … what if we have different services, do we do a different one for each service?

GEORGE: When I ran into that with clients, what I found is that there is typically a common theme; and then, when you have different audiences, there is a branching point in your core client process.

Do you have two different audiences?

JAMIE: I do.

GEORGE: What's one audience?

JAMIE: One is writers and one is independent professionals.

GEORGE: For the independent professionals, what do you help them do?

JAMIE: A lot of them need help deciding on the kind of book they want to write and how to structure it. And the writers come to me after they've probably already written, at least, most of the book.

GEORGE: So, the common theme for both of them would be something like … well, you start out by understanding what their dreams are, what their goals are, what the possibilities are; and then, the next thing you might do is to understand what their current situation is in terms of resources, emotional state, energy level, and things they've tried that have worked and haven't worked.

And then, you might branch off. And for the writers, you might take them down the path of, "Okay, here's where we go into the strategy of your next steps and resources for you."

What did you say the entrepreneurs need? They need to write but they're not writers.

JAMIE: They may not be writers, but they're not really sure what kind of book they want to write.

GEORGE: For the entrepreneurs who want to write a book and are not sure what to write, you would take them down a different type of exploration with a different line of questioning than you would with the writers.

So, the initial two or three or four elements of your core client process would be the same or similar; and then, it would differ.

And then, what you'd say on your website or in conversation is, "When working with writers, this is my approach. I do this, this, and this. When I'm working with entrepreneurs who are trying to figure out what to write about or what their book should be about, I take them through this approach."

And, ultimately, no matter what approach they take, then end up with blank, blank, blank.

JAMIE: Don't say the word "blank." They'll think blank pages.

GEORGE: Yeah! Alright, other questions?

Okay, we will then see you on next week's training session; and we'll work together on the virtual workday. And if you have any questions and technical issues that come up, shoot an

email to Jill at jill@freedompreneur.com and if there's anything I can help you with, get in touch with me george@freedomepreneur.com.

We will see you all next week. Take care and have a productive week.