GEORGE: Welcome to Session #5 of the *Get Paid to Get Clients Acceleration Program*, and if you haven't done so already, I want you to download and print the handout for today because we're actually going to use that as we go along. You should have gotten an email yesterday with the link to get to this handout. And if you haven't done so, go to that handout.

The next thing on our agenda is: Are there any questions from either the mission from last week or anything else in between even from previous weeks?

JAMI: I have a question. At your insistence, I took down the mention on my website of the free strategy session. There were a couple of sort of caught in the pipeline in the meantime. And so, I'm working with that kind of a hybrid, in the meantime; and I did one last night.

Do you have any advice about what to do in the meantime until this is all in place?

GEORGE: What I'd do is I'd use it as an opportunity to practice your up-and-coming paid strategic session. And so, I'd use it as a practice run for exploring additional content, testing new content for your strategic session, changing the format, and potentially changing the flow of how your sessions go.

I would also be mindful of the time. I don't think I would spend as much time or go into as greater detail as I would if it were a paid session. But I'd definitely use it as an opportunity to refine my own internal processes.

JAMI: Well, I have been using the new snapshot. I've been using a couple of the new techniques which feels good.

GEORGE: The other thing I'd do is I would use it as an opportunity to start writing out your core client process into your strategic session and experiment with it. In other words, experiment with elements that you think should be showcased and highlighted as part of your core client process.

The key with this system, as you'll see, is to practice. And once you get the basics down and you get more comfortable with the fundamentals of how it flows and the content and the sequence and the structure, then, you'll start to see nuances in what you have to offer to people.

And I promise you … it's virtually a guarantee that that's going to happen if you stick with it. And I know that for a fact because even for me, I see nuances in what I'm doing and in what I offer simply by training other people; and I'll say to myself, "Oh my gosh, I didn't realize I did that!" or "Oh, here's a little nuance here that I should point out to people. It's an important distinction."

So, use this to practice. I think it's a great thing that you've got these people to whom you've offered free sessions to and you've had a chance to have conversations with them. It's far better than trying to do this in a vacuum. Actually, it's impossible to master this approach in a vacuum.

Is that helpful, Jami?

JAMI: Yes.

GEORGE: One final piece of advice: Don't feel badly at all that you have these free sessions that are still pending.

JAMI: I don't feel bad about it. It's more like I had a way of handling the other ones and I'm not that smooth at the **[inaudible] 0:05:11.0.**

GEORGE: It's a great practice opportunity. Let us know how it goes.

JAMI: I think I landed her last night but we'll see …

GEORGE: All right, keep us posted.

What we're going to do is we're going to review where we've been because the purpose of today is to put it all together. I'm going to help you identify any missing steps, scripts, or tools in your sequence; and then, I'll send you off on Mission 5.

If for any reason you cannot print the handout or just can't get to it, you can just take a blank sheet of paper and follow along. And the first thing we're going to do is review the phases of client flow.

Something occurred to me in taking you through how to create and identify your core client process. It occurred to me to show you how to approach it in a way I've never seen before. Actually, I've taught other people how to do the core client process, but it just became clear to me the other day.

Sam showed the other day a lot of detailed steps that he took clients through, and I think that's a good place to start if that's what comes to mind. And then, what you want to do is backtrack and think about phases or different stages—general stages that people go through.

And, ultimately, what we did with Sam was to take his very detailed steps which were all accurate and appropriate and generalized them, backtracked into different phases or stages that people go through. And that helped Sam to arrive at a core client process that was digestible by his audience and that also helped him to create his own framework about where people generally are.

I'm, ultimately, saying that in your core client process, think of two things: phases or stages. Here are high-level views of where people are, and then the specific steps. And you can start with either; and then, ultimately, arrive at a mixture of phases and steps.

So, here are the phases or stages of client flow, in general, and this applies to service-based businesses and it also applies to product-oriented businesses:

Who can tell me what the first phase is? It's the one with the magnet.

Participant: Attraction?

GEORGE: Attraction, perfect! So, fill that one in on your handout or blank sheet of paper. And then, the next phase after attraction would be?

Participant: Is it discovery?

GEORGE: Yes, or sometimes, they call it "exploration." And then, what happens after this discovery or exploration phase? Any volunteers?

Participant: It's the conversion phase where you try …

GEORGE: Very good! And then, this next phase (I've given you a term for it), what term have I given you in the past?

Participant: Consumption.

GEORGE: And I'm still searching for a better word. I word I came up with the other day was "continuity phase" which means that you put them to some sort of a continuity program. You pick up from where you left them with the strategic session and continue the process of working with them and serving them and providing value.

Participant: Journey to transformation.

GEORGE: Journey to transformation, exactly.

Participant: Consumption sounds a little …

GEORGE: I know. It's slightly draconian like they're going to be consumed. But I meant "consumption" as in they're using and applying your material. I think "continuity" may be a better word.

Participant: The end goal of Stage 1 is to attract; the end goal of Stage 2 is discovery; the end goal in Phase 3 is conversion; and so, the end goal of Phase 4 is transformation.

Participant: What about "retention?"

GEORGE: I used to think of "retention" but I prefer to have this client-centered as much as possible; and I know "client conversion" isn't as client-centered. But as long as you get the general idea, I'm happy.

Participant: Somebody mentioned journey. What about "client journey"?

GEORGE: "Client journey phase"?

Participant: It's too vague. The whole thing is a journey.

GEORGE: It is a journey. That's right.

Participant: "Consumption" just leaves a bad taste in my mouth.

GEORGE: Yes, exactly! I'll change that for the next run in this course. But, maybe, "client-service phase" or "client-delivery phase" … I don't know. But I'll remove "consumption" in the future.

Participant: Engagement?

GEORGE: Engagement—that may work. But you've been engaging people up here as well. You're engaging people at each step of the process; and, in fact, this approach I'm teaching is designed to help you to engage people at every phase here at a higher level of connection, a higher level of communication. I'm not sure if "connection" here is the one we want. But I think you get the idea.

Participant: What's the end goal?

Participant: Relationship?

GEORGE: The end goal is that you get to help that client; you get to serve that client and help them to achieve and accomplish the outcomes that are important and valuable to them.

Participant: Well, then, it's either "transformation" or "goal attainment." In Phases 1, 2, and 3, you defined the end state. So, "goal attainment" or …

Participant: How about something about commitment like you're committed to each other; you're together. It's almost like a marriage.

Participant: Like co-creation?

Participant: Or mastery?

GEORGE: I'm not sure. See, commitment happens in this conversion phase as well. In fact, that word is actually written up here. I'm not sure. It's something broader where you continue to work with them. It is a transformation, for sure.

All right! Well, again, you get the idea and I'm happy if you get the idea. Let's go on to the steps. Now, don't go cross-eyed. You have this in your material, and the only thing I did here was to add a few topics in burgundy color. And these are tools and scripts in technology and documents for you to create. I'm going to go through this with you step by step. So, don't worry.

And in your handout, I've decided to make it easier for you to identify any missing thing that you need to create—any missing element.

In the handout that I gave you, there's a quick and dirty checklist that you can use to identify, as we go along, in the next few steps what you need to create or what you need to refine.

Let's start at the top. Let's start with Step 1.

- ✓ Step1, in general, is initial contact with the potential client that can be live or virtual; and then, you arrange the initial "get acquainted" conversation; and you complete your initial "get acquainted" conversation.

- ✓ Now, Steps 1, 2, and 3 may happen all at the same time. And I gave you a sample script for that initial "get acquainted" conversation. And your job is to take the script, modify it, and make it your own. And, again, a script is not something to be read through verbatim. It's a general guideline. It's a memory jogger for you.

- ✓ So, part and parcel of Step 3 is to invite your potential clients, if it's appropriate, to fill out a snapshot questionnaire or, if it's not appropriate for them to fill out a snapshot, redirect them elsewhere.

- ✓ And we move on to Step 4: If you've invited a client to fill out a snapshot questionnaire, then you send them the snapshot which could be a Word document or an interactive PDF or send them a link to an online form. And I gave you some examples of snapshot questionnaires; and I gave you the actual one that I use; and I gave you one from a client of mine with is a slightly different format; and I showed you an online snapshot form which I have live but I rarely use it.

- ✓ Then, on to Step 5: So the potential client completes and returns the snapshot to you; and that's when you review the snapshot. And that takes us to Step 7 which when you're reviewing the snapshot, you want to be looking for pattern, any areas of interest that jump out at you or any areas of concern that you see.

  You're looking for information that can already give you a sense of what's going on with that client. And what I'd like to do here is to bring those areas up to the client. I usually will email back and forth with the potential client and ask them questions; and I like to do that because it really does go far to cultivate that relationship and to demonstrate your genuine interest and concern for that potential client.

- ✓ Then, on to Step 8: After you've satisfied your curiosity and you've gotten the initial preliminary question addressed, then, you schedule and conduct your second brief touch-base conversation.

  Now, one little caveat here: In Step 7 where you're clarifying specific areas of interest and/or concern, you don't have to go into the nth degree of detail. You're not trying to accomplish your strategic session in that initial phase in Step 7. You're just getting enough information to work with that gives you a general lay of the land.

- ✓ I gave you a sample script for the beginnings of your second brief touch-base conversation, and that takes us into Step 9 which is if it's appropriate during that second brief touch-base conversation, you invite your prospective client to participate in your paid strategic session. And, again, if you're not using a paid session, you simply invite them to your free strategic session. And I gave you a sample script for introducing that strategic session.

By the way, with these sample scripts, after you've written them out, definitely, what I would do is I'd print them out. I'd put them in those plastic page sheet protectors; and I'd put them in a notebook, just a one-inch binder notebook; and I'd have it available next to the phone or next to the computer. And then, you can page through it silently without pages crinkling to guide your sequence and flow until you become so comfortable with it that you don't need to refer to any documents any longer.

The other thing I want to say about these scripts is to definitely practice them. If possible, practice them on people who know and trust you already. Invite friends to be test subjects for you. Or if you already have clients who are scheduled as Jami does for free sessions, you can use them as practice.

- ✓ Then, on to Step 10: And Step 10 is where you send the client a link to process their payment prior (I emphasize "prior") to conducting the strategic session. This is where you need a little bit of technology set up. It could be using your online shopping carts or PayPal, Intuit Payment Network, or e-Check Processing.

  It didn't occur to me that this was a distinct step until I had a client who wasted a lot of time chasing down two to three clients for payment after they've completed the strategic session.

- ✓ Step 11 is a biggie. It's conducting your strategic session. In order to conduct your strategic session, you first need to create the framework, the content, and the flow of your strategic session. And this is where I showed you in one of the previous training sessions the diagnostic sparkline.

  And just by way of a brief review, the diagnostic sparkline is a framework for really telling a story. And in the initial phase of your diagnostic sparkline, you're leaving **0:21:33.2** your client where they are; you're using your diagnostic questions; you're inspecting and you're digging into their lives, digging into their business; and if you have some sort of diagnostic tool, you're applying that at this stage.

  And then, we move on to the "call to adventure." That's what Nancy Duarte calls it—"call to adventure." And this is where you're first really laying out the gap between where they are now and where they want to be. And then, you go into what's called "contrast frame" where you're flipping back and forth between where they are now and what could be possible.

  So, this is where you get to educate and inform and point out blind spots. And then, the call to action is where you provide a summary of your professional assessment of where they are, what could be possible, what the core issues at hand are, and the options and alternatives to them.

What are resources that you have or that other people have? What are the recommendations that you have for various approaches? strategies? specific steps?

And given the options that you've laid out, the call to action is—do they choose to move forward or not? You want to leave them in this strategic session with a road map and with a clear set of actions steps that you could take if they choose to move forward.

And part of them choosing to go forward is making the commitment. It's a commitment to themselves, commitment to the clients they serve; and it's a commitment to you if they're choosing to work with you.

And then, I gave you an example of a strategic tool. I use a question-based assessment. And there are myriad of other tools that you could use depending on your particular industry including online surveys, questionnaires, profile systems, and so forth.

And this is my reminder to remind you that in your strategic session, you want to integrate key elements of your core client process into the strategic session. You'll actually mention those in your strategic session; and even if you don't mention them specifically as part of your core client process, you'll mention those key areas as markers or important areas for your clients to focus on.

- ✓ Then, on to Step 12: Part of your strategic session, as I've mentioned before in the sparkline, is summarizing your recommendations for moving forward. And I like to give people a written map. I use mind-mapping software but you could write this out by hand or give them a Word document. Or if you're really good at drawing, you could create a visual diagram.

- ✓ And then, on to Step 13: So, you want to determine whether this is a good client to work with; and, if so, get their commitment for moving forward. And I gave you a document that includes ideal client selection criteria; and what I recommend you do with this is to take a look at it and modify it for your own purposes. And I would actually add to this. I would add specific things especially under Item #6.

- ✓ So, Item #6 on this list is to make sure that these are people you would love working with. Under Item #6, I would create a list of those qualities and characteristics of the people you love working with.

  And, if necessary, create a different section on this document or a separate sheet of paper that included qualities and characteristics of clients you do not work with—like absolutely do not work with.

If you need that, use that as a reminder when you come across a client who is tempting to work with because the money is good or you really want to help them but they're not just a good fit for working with you. Resist the temptation and use that if you need to have a document next to you to remind you.

- ✓ Then on to Step 14: If during that strategic session, the client has chosen to work with you, I would go ahead and schedule the first session as well as the recurring sessions. Just get those into the calendar.

  Now, not all clients are wired to make a decision on the spot. Some people are simply wired to consider all the facts, all the figures, and all the considerations and take some time to make a decision on whether to work to with you or not. Sometimes, it means that they need to have a conversation with an advisor or a friend or a spouse.

  Don't be worried, concerned, upset, dejected, or deflated if a client does not choose to work with you immediately at the end of that strategic session because everybody has a different way of reaching decisions; and for a lot of people, it means they don't make decisions on the spot.

- ✓ Then, on to Step 15:

  After the client has given you a verbal agreement and the verbal commitment to work with you moving forward, then, what you want to do is send them what I call a "registration logistics" packet. And mine consists of two elements: It's a client agreement, and you have a sample in the training center of the very agreement that I use and an example of the registration form which simply captures the payment information as well as some few initial goals that the client has.

- ✓ And then, you're off to the races—Step 16 which is to begin working with your client at the appropriate phase of your core client process.

One thing I want to add is that at any of these 16 steps, clients may get stuck or they may take a pause or they may need to say that they'd get back to you. And I what I recommend you do is, of course, follow up with them.

You've probably heard of the adage that the fortune is in the follow up, and I think there's great wisdom in that. What I'm suggesting you do is have some sort of a system so you know who is in your high point as a potential client.

In the beginning, you may have two or three and you could probably keep them in your head; but as you get busier and you end up having five, six, seven or more people in the pipeline who are going through your sequence, you probably need to write some things down or, at least, use index cards or create a spreadsheet of some sort.

And I think it's important to do this so you stay organized and people don't fall through the cracks.

Another thing that I think is really important is that you track your results especially in the beginning when you're learning this process. I have spreadsheet that I created that allows me to track my results. Let me see if I can show it to you.

So, this is the spreadsheet I was speaking of. Let me make it bigger for you and I'll show you how this works. And you'll have a copy of this very spreadsheet in the training center.

So, this is how it works: Let's say that I'm doing a speaking event today. So I put in the number one in this column and today is the 27th. And it's a speaking event for the bank and it's a free event. And, let's say, I had 55 people who RSVP'd and 30 people showed up. That means that the attendance was 55%.

And let's say I had three programs or products to offer; and the first program was a program for $295 dollars; and, let's say, four people bought that. That means revenue here is $1180 dollars and that's a 13.3 conversion rate.

And, let's say, the second product or program that I offered was for $149 dollars and two people bought that. That means my revenue from that product sale was $298 dollars for a 6.7% conversion rate.

And, let's say, I offered a third item for $39 dollars and five people bought that. That means my revenue from that was $195 dollars or a 16.7% conversion rate.

The spreadsheet, then, calculates your total: Eleven people—total purchase—for a total revenue of $1673 dollars and an overall event conversion rate of 37%. Not too shabby.

The spreadsheet will also calculate for you your totals of all the events cumulatively. So, in this made-up scenario, 96 people have purchased over the time here that we're tracking for a total revenue of over $12,000 dollars and a 29% conversion rate.

So, this is where you enter your data. It tells me in this summary sheet that I've entered 7 events and I've had a total number of 451 RSVP's. These are my total number of attendees for a 73% attendance rate. This gives me my total number of sales and breaks down the number of sales by different offers and my total revenue by different offers.

And it gives me my averages, my average revenue per event, and my average sale price. The "per head average" means that of all the people in the room, if you look at everybody who has attended and what each person is attending, what is each person in attendance worth to you, in general? That's $38 dollars per person attending.

For these events, 64 people, on average, register; and 47 people, on average, attend the event for a 28% no-show rate. And then, it gives the conversion rate.

So, I recommend that you use something like this. You can modify it if you want to, if you know Excel. It is password protected but there's no password in it. It's just protected so that you don't accidentally knock out a formula. But if you know Excel, you can just modify this as you need.

And, actually, there's a little **[inaudible] 0:35:31.2** here where you need to widen this column.

Jill, can you make a note to widen this column before we put up the spreadsheet in the training center.

CARRIE: George, I have a question. At the end of the strategic session, I made my strategic session with columns because mine is kind of technical; there are not a lot of words. So, I've one column which is the answer to the question that I'm asking; and then, the other column is what I'm recommending we do about that.

Is that the right way to be doing this, that I'm kind of filling it out **[inaudible] 0:36:42.9** at end of the strategic session I could actually hand that and make a copy for my clients so I have something to leave with them, and I leave with a copy and they have a copy?

GEORGE: In theory, yes, that sounds good. In actual practice, it may be challenging to have set up your columns that way. I personally think that you're going to be better off if you use the mind map to take those very categories, those columns that you mentioned. Put those into a mind map.

And the reason I recommend a mind map for you, in particular, is because one, you already have the software and you like it; secondly, I think it's easier to move the topics around.

CARRIE: That's true. So, then, I'd be carrying my laptop with me to the session.

GEORGE: Yes, or if you've got an iPad, you could run in on an iPad.

CARRIE: That's an idea. **[inaudible] 0:37:44.1** to go out and get one of those.

GEORGE: I didn't mean to give you an excuse to get one. The only thing is that you'll have to get the Mac version of the software because you already have the version for PC.

CARRIE: It's a different version?

GEORGE: It's a different version, yes. But there is a version for Mac.

Could it work if you have columns or if you use a Word document? I think it could. When I first started, I didn't use a mind map for this purpose but I tried using a Word document with different sections laid out in it. But I found that it was too clunky for me. I just couldn't get to the right sections fast enough. **[inaudible] 0:38:27.7** speaking in real time with a client either live in person or virtually; and that's when I went to a mind map.

CARRIE: But the concept of having information, the answers, and recommendations live and leaving it with them, that part is right?

GEORGE: Absolutely! I gave you an example of my actual session. It looks like this. This is a snapshot.

CARRIE: I should know that because I just …

GEORGE: Yes, you've got one of these maps.

CARRIE: That's what you did with me. So, I'm assuming it's what you want us to do, too. By the way, this could be a good time. I could put in a plug for you and tell people how fabulous it was.

GEORGE: Oh, sure.

CARRIE: I did a strategic session with George the other night (Friday night, it was) and it was way beyond what I even expected it to be. It was just fabulous. He has this … what did you call that analysis thing that we did?

GEORGE: It's the "Bus Concept Human Performance Profile System"

CARRIE: That is really an enlightening thing to do. And I've got to tell you. I've done a lot of different things like that, and nothing compares to that one.

So, I would highly recommend … as much as you've gotten out of this workshop we've been doing the last few weeks, that'll take you to the next level. It's really great.

GEORGE: Thanks, Carrie.

CARRIE: You're welcome.

GEORGE: On to Mission 5. So, your mission is to assemble and integrate all the key components that are necessary for you to carry out your strategic session. And so, you now have a checklist of elements that you either need to create or refine.

I want to give you another way of looking at putting your sequence together. Frequently, if you see a different viewpoint, it triggers something. You'll see things that you haven't seen before.

And so, in your handout, on the last two pages, you'll see a 2-page checklist. This is called the *Get Paid to Get Clients Mastery Checklist*. And you'll see that as you go through each of these check boxes, it's very similar (in fact, it mirrors) the 16 steps that we've gone through but with a slight variation in the wording and the detail.

And so, what I recommend you do (and we can run through this right now, actually) is to get out your checklist and if you haven't printed it out or you can't get to it for any reason, then, write down on a blank sheet of paper number one, and we'll go through the 25 elements here; and then, you'll be able to circle which of these elements you need to look at or review or which ones you've checked out and have handled.

- ✓ So, starting at number one—attraction marketing. You must have a reliable, repeatable process for attracting qualified potential clients, customers, and patients that aligns with your natural talent and that you enjoy using.

  Let me emphasize that—that you enjoy using. I don't care who the guru is. I don't care if they say you can make a million bucks in the next two seconds by using their system. If you don't enjoy using it, you're not likely to apply it on a consistent basis. It's not likely to work with you.

  You've got to find a way of attracting clients, of generating leads, and engaging with potential clients that resonates with you and that you feel good about energetically.

  This is the introduction to the introduction. In other words, you need to be confident about what you ask and what you say during that initial conversation with the potential client. This conversation could be brief or it could be long because you might have met somebody at an event. It maybe a social event; it could a business event; it could be lounging at the swimming pool which has happened to me before and ended up with a client from that conversation.

- ✓ So, whatever you do, when you engage in this initial conversation, it needs to be natural and comfortable and, if appropriate, leads people to the logical next step which is the snapshot.

- ✓ And that leads us to Item #3 which I'm calling "pre-qualification." Pre-qualification is one of the functions that the snapshot serves which is to pre-qualify whether this is a good potential client for working with you.

- ✓ Then, on to Item #4 which is the prospect process. As I've mentioned before, in terms of following up, you want to have a reliable system that could be just index cards for following up with potential clients who don't make it past the snapshot. The most that I would probably do is to make sure they get the snapshot.

  I don't spend a lot of time and energy reminding them to fill out the snapshot. I figure if I know, at the least, that they received the snapshot, then, it's up to them whether or not to fill it out. Again, I don't want anybody who is trained by me to waste any time trying to get people or to cajole people into filling out a snapshot.

  On to Item 5, that's the invitation. So, after you've reviewed the initial snapshot, if it's appropriate, you invite them to engage in a strategic session which ties into Item #6 which is articulating the value of your strategic session. And in your training materials, you have a framework for the key elements that need to go into your strategic session.

- ✓ And one thing I want to emphasize is Item #7 which is the title. I recommend that you create a unique outcome-based name for your strategic session.

  There are a couple of reasons for that: 1) it distinguishes what you're doing from everybody else and 2) it makes it more memorable.

  A strategic session can be generic. What I call my session, frequently, is a business acceleration assessment; and you saw that on the handout that I gave you with all my questions on it—the business acceleration assessment.

  I've mentioned this before but don't call it an "introductory session" and do not call this a "sample session." You can call it a "bookkeeping strategic session." You could call it a "book publishing assessment." You could call it an "evaluation."

- ✓ Step 8 - Pre-payment: You definitely want to get payment for the session before you conduct the session. I would even go so far that if for any reason the client has not paid for the session, when you both arrive at the scheduled time, I would not conduct the session.

  It may seem kind of harsh, but it really sets the framework for how you work moving forward—that they must pay you before the session. I think if you don't do it that way, you're going to run into potential problems.

  Now, if you're kinesthetic like me and you want to test it and see if you run into problems, be my guest. But I can tell you from my own personal experience and from working with clients that if you skip this number 8, pre-payment, you'll create unnecessary work and challenges for you; and it can adversely affect your working relationship with the client. It is not a good way to start out a working relationship with a client.

- ✓ Number 9—Effective strategic session format: I won't belabor that. You've gone in the training center and in previous sessions, we've gone through an effective format.

- ✓ I want to emphasize number 10 which it to make sure that you've got a consistent approach. The only way to make sure you have a consistent approach that's natural, that's comfortable, that's builds credibility and trust, and that naturally allows people to engage with you and to share sensitive information with you is you have to practice it. There's no other way around it that I know of.

  I arrived at this approach from having worked with and interviewed probably thousands of different patients over my medical and surgical career. And so, I was already very comfortable at carrying out this strategic session format. I just didn't know I was doing it in a strategic manner. It was just invisible to me.

I don't want you to think that to develop this consistent approach, you have to have been a doctor like me and that you have to have interviewed thousands of people. You don't.

I don't know what the magic number is going to be for you to feel comfortable using this approach. It's going to be more than probably five. But it's not going to be a thousand. So, somewhere in between, you'll find what's comfortable for you; and with self-awareness, you'll continue to refine and improve your approach.

- ✓ And that leads us to number 11 which is competent. You simply need to practice this enough that you're comfortable. You're competent in leading clients through your sessions, through your strategic process.

  And, admittedly, I've told you that I needed to take you through a linear description of how this all works; and in the real world, it doesn't always follow an exact linear sequence.

  And so, what I'm saying is that in your strategic process and, actually, in all the steps, sometimes, you have to get to one step before the other in a sequence different from how I've laid it out. And that's just the way real life is so that's why you have to become comfortable and competent with a dance. This is essentially a dance. This is a communication and relationship dance with your client.

- ✓ Number 12, you ought to highlight. Your strategic session, the way I have trained you, the way I use strategic session myself is that they absolutely and imperatively must provide stand-alone, outcome-based value.

  Your strategic session, the way I've designed it and the way I've laid out the system is not designed to be self-serving. It's designed for you to be of service. And the way I've trained you is that the strategic session does provide a stand-alone value. It is naturally designed to have people want to work with you. The session is not designed around selling people or manipulating people. It's designed, first and foremost, to be of service.

- ✓ On to 13 – Evidence: In starting out, you might not have this part. So circle this as an item to be cultivated and developed. You want to have real world evidence that your strategic session provides outstanding value.

  How do you do that?

  You heard from **[inaudible] 0:51:38.6** and this is not pre-planned; and she, on her own volition, told you about the value she got from the strategic session. In a previous training, Jami also voluntarily shared her experience of the value she got from the strategic session.

Jami also has an opportunity since she has some free strategic sessions coming up to provide great value during those sessions and come away with real world evidence by way of testimonials and rave reviews that those people she did free sessions with got outstanding stand-alone value from her strategic session.

So start collecting this evidence.

- ✓ Number 14—Price: Here's the thing. We haven't talked much about pricing and we can certainly do so especially in the workdays. The principle is that you price your strategic session so that it's attractive to potential client and it weeds out the tire kickers; yet, it also needs to be worth your time to deliver

  I once had a client two or three years ago whom I was teaching this system to, and her paid session was like $75 dollars. I thought it was kind of low but it seemed to be working for her so I just let her leave it there.

  So you might not have the right number for the pricing of your strategic session right off the bat. Just be aware of making sure that it is attractive and a price based on value. It's affordable and yet valuable to your audience; and it's worth your time.

  If you're pricing it for a hundred dollars and it takes you five hours to deliver your strategic session, you've got to rethink your pricing as well as your efficiency.

- ✓ Number 15—Guarantee of Value: You want to be able to say this without batting an eye—"I'm so confident about the reliability in real world value of my strategic session that I offer an ironclad guarantee of value. If you don't find that my strategic session (after going through this) blows you away and has your head spinning, if you find that it does not give you the insight, the road map, the strategy, the plan of action that makes it worth your time and money, you just let me know and I'll give you all your money back."

  You have to be able to offer, I believe, that kind of value, that type of guarantee, that confidence, and that stand for the value that you provide through your sessions.

  You may want to write out your guarantee of value; and then, practice speaking it. This is a place you don't want to stumble or fumble when you're verbally delivering it.

- ✓ Number 16—Action Plan: So, at the conclusion of your strategic session, it's important that you write out the specific action plans for your client. If you're giving them a mind map or a document, they can look just at that section and be reminded of where they should start.

- ✓ Number 17: It's having your ideal client selection readily accessible to you either in your mind or on a sheet of paper.

- ✓ Number 18: Your next-step recommendation is super important in your strategic session because if you're delivering your session properly, then, people will want to know the next steps for working with you. And, in general, before I even get to say it myself, clients who go through my strategic session are already asking. They bring it up on their own: What are our next steps for working with you? What would it look like to work with you? What are the options for working with you?

- ✓ Number 19—Redirection: This is something that you'll have to become comfortable with because from time to time, you'll identify a client at some point in the process who is not a good fit for working with you. And you might want to write out the scripting for this, but you need to have a way to respectfully and compassionately direct them elsewhere.

  And this may be something that is uncomfortable for some of you, and that's why I recommend that you write it out. It doesn't have to be very long. It could be as simple as "Based on the information that I have and the conversation that we've had, I think that you would be better served and would have the greatest chance of achieving your goal by working with somebody other than me."

  And if you have resources, then, you can give it to them; if you don't, then, you say, that's it. That's where you end the conversation.

  By the way, if you get into this situation, do not get caught in the trap of having to justify why you think they're not a good fit for working with you; and you just simply say, "Hey, my professional opinion is that you would be better served by working with somebody else." Leave it at that. You don't have to say, "I don't like your hair; I don't like the way you talk; blah, blah, blah." Just say, "It's my professional opinion and nothing personal."

- ✓ Number 20—Effortless yes: I alluded to this earlier. Your strategic session should naturally eliminate any fears, concerns, and natural resistance that we have as human beings to 1) moving forward with the plan; and 2) any resistance and objections to working with you in particular.

  The point of the session is not to pressure anybody. I'm not teaching you how to pressure people. That's not what we're doing here. But this should lead people to a natural effortless "yes."

  If they're going to say "yes," it should just be so self-apparent to them. They're saying to themselves, "Why would I not do this? If I really want what I say I want, why would I not do this?"

- ✓ Number 21: Have a contract. Have written agreements in place.

- ✓ Number 22—Analysis: This is where I showed you the spreadsheet I'm giving you. Even if you don't use a spreadsheet and you calculate this by hand, I recommend, especially in the beginning, that you track your lead generation and conversion statistics. This is the only way you'll be able to objectively see what's working and what's not working so that, at any stage, if you make any change in your approach … say you have a breakthrough in your own personal growth and transformation, if that occurs, if that kind of personal growth and transformation occurs, I guarantee that it will show up in your results, in your lead generation, and in your conversion.

  When you track objectively through using numbers, you'll be better positioned to understand what is working and what is not working with you. And so, when you do make changes, you'll be able to do this more intelligently rather than haphazardly thinking—Oh, yes, my conversion rates are great. I'm doing well with my conversion. What does that mean? I don't know what that means. It's just like going to a restaurant and saying, "What is the size of your small bowl of soup?" and the server says, "Oh, it's a nice size." That's super helpful.

  We're nearing the homestretch here.

- ✓ Number 23—Core client process: As I've mentioned before, your core client process must be unique. It must be a well-defined approach for working with your client and delivering your value; and I do not expect anyone to have their ultimate core client process worked out at this stage. It's a process in evolution. All I care about at this point is that you have something to work with and that you'll continue to refine this actually for the rest of your business career.

- ✓ Number 24: Do you have a system for following up especially following up with people who after you've done a strategic session with need to have the time to process all the information and figure out where they ought to go next and get their thoughts and feelings sorted out?

  Frequently, after a strategic session, you'll have delivered a neuronal scramble. You'll have pointed out blind spots for them; you'll have helped them to gain insights into areas that they hadn't thought of before. You'll have given them probably a myriad of different ideas that they hadn't thought of for themselves.

  And, frequently, that can mean that you've inadvertently and temporarily, mentally and emotionally paralyzed them. So if you sense that that's going on, then, definitely follow up with them to make sure they've come out of the temporary stunned phase.

They probably have questions for you that they didn't know they had that may come up after the session is over and they've had some time to settle in to what you've shared with them. So, do make sure you do have some sort of follow-up process.

I have to brag about one of my clients. One of the clients I have been working with recently achieved the six-figure annualized revenue stream milestone at the 100-day mark of working with me. He started out with the monthly-recurring revenue of $250 dollars a month. And on the hundredth day of working with me, he signed on a client that took his monthly revenue almost to $9000 dollars a month. I think he's at $8750 per month and **[inaudible] 1:02:52.9** longer-term contract so we know the revenue is very reliable.

And his goal is to double that. That was his initial goal when we started working together. It's to hit the $20,000 dollars per month revenue mark. And so, he's accelerating toward it.

- ✓ Number 25—Inner success: In our training session next Tuesday, we're going to work on this. Outer success comes from doing the inner work. So, your inner world defines and creates your outer world. In order for you to take your business to whatever you say the next level is, it is imperative for you to expand your beliefs, your thoughts, your feelings about yourself, your decision making, and the way you take action in the world. It's imperative that you expand all of those to the level sufficient for you to operate your business and to operate in your life at a different level of freedom, expansiveness, contribution, profitability, and prosperity.

  And this expansion, this inner work may be the hardest part of the system that I'm teaching you. I don't know for sure but I suspect that the people who have been exposed to this system and the people who gave this a trial run … there were people who started out in this program who were on a trial basis and not a single one of those people stuck. I don't know for sure because most of them said, "I just don't have the time."

  But my suspicion is that most of these people, if not all of them, got the sense that in order to use this system successfully, they were going to have to do real work—real work on the outside and real deep work on the inside. That's why this is absolutely critical for moving forward.

  Next week, I'm going to take you on some approaches that have worked for me, approaches that I've used for clients to expand these limited beliefs, thoughts, feelings, and actions that people carry around with them.

Let's see if you have questions. Kat has a question: "Will you send clients a satisfaction survey?"

Great question! The answer is absolutely yes. Absolutely yes, I would do that.

What I recommend you do is you get feedback from your clients along the way. During your sessions or at the end of sessions, you can ask people to reflect back to you: What did they learn from today's session? What was the most valuable thing you got out of today's session?

Intermittently (and I would say maybe monthly would be too often but, perhaps, quarterly, every three months or so), you could give people a formal and brief survey just like what you're mentioning, Kat. Or at the conclusion of working with them, you can give them a survey as well.

But the thing I don't like about doing it at the conclusion and the reason I prefer that you do it along the way is because if you find that things are not working for your client along the way, then, you can do something about it. You can do something to improve how you're delivering value to your client.

If you do it at the very end, you don't necessarily have a chance to make it better or make it right for that client.

Kat, anything you wanted to add about that?

KAT: The reason I was asking that was not so much that I would always be checking in with my client but, at some point, it's just to have some kind of a written form to keep the information as time goes on so that you can accumulate some statistics. This seems like it would be easier to have in writing once in a while.

GEORGE: Tell me more. What kinds of things would you have in writing?

KAT: For instance, when I was working with clients in my previous company, there were times when I wanted to add some information to my website and get testimonials and things like that. I was just wondering when you were talking about evidence. Rather than just keeping it in my head and then trying to remember down the road …

GEORGE: Oh, very good—great point! In that case, along the way, then, I don't think I would necessarily send out a formal survey for this. For purposes of getting real world evidence or short snippet testimonials, I don't think you necessarily need to send out a formal survey although you can.

I would just ask the client three simple questions: What was it like before you started working with me? Then, they say whatever they say. The second thing I would ask is: If you were going to tell your next-door neighbor what it was like to work with me, what was that like? What did we do that made a difference for you? Then, you'd describe what that was—"Oh, George, maybe stand on my head for six hours at a time."

When we were doing the work, what kind of results did you get from working with me? What would you tell your neighbor about what you got out of it? Maybe it's something specific, maybe it's something related to revenue or numbers of client or the experience of working with me. What was that like?

There you go. You've got a very powerful framework for a testimonial. It just goes like this: What was it like before you started working with me? Number two is: What was the work we actually did together? And three: What were the outcomes?

Now, you can get fancier than that; but that covers what people really need to know. I don't know if I took your question and went off on a tangent.

KAT: I think that's what I was trying to determine. Is it better to get written evidence? In the past, I pretty much did what you were talking about. It was mostly verbal. I just checked in to see if there was something else that would work better.

GEORGE: Yes, get something written which, sometimes, I'll ask for; and I would just probably send them and email and say, "Hey, could you just jot down those three things. Write them: Describe what it was like before we started. Reply back to me with what we did and what results you produced."

And you could do that at any point in your working process. It's always better to get this, by the way, when they've had a huge win. Like my client who just hit the $8750 mark per month, I ought to get something like this from him right away. In fact, I will do that. Thanks for reminding me, Kat.

KAT: I have one more question on Number 21, the contract. I saw yours. How do you go about developing that or will we be talking about that?

GEORGE: No, what I would do is take my agreement and I would model off of that; and you can weigh the steps that you think are extraneous or too detailed and use my agreement as the starting framework. That's the simplest way I know of.

Some people have taken my agreement and chopped it down to a 2-page long agreement. I think my agreement is about 12 or 15 pages long. I've added to it along the way when I found that I needed to add elements that enabled me to hold my clients more accountable.

And I've thought about making it shorter because I think—oh, my gosh—15 pages! That's like one of the last things I'd personally want to go through. But I've looked at it over and over again and I've found that it's important and valuable for helping me to work very intimately with a client.

For your particular audience, it may not need to be as detailed, and some of the things may not be relevant. But I would just start with that agreement. It's in a Word document so you can edit it out.

My philosophy is this: If you want to get from Seattle to Los Angeles, the fastest way for me to do so is to get on a moving train as opposed to building the train from scratch. So if you use the document I have, that would be akin to being on the moving train rather than trying to build something from scratch from a blank Word document.

KAT: Thanks for letting me copy.

GEORGE: That's why I give you these examples. Any of this stuff, if you need to take something verbatim, then, you're supposed to do that. That's way I did when I was learning the right marketing copy. I would take verbatim stuff that I like off the web. And then, I would just start replacing words with my own. And, eventually, I became proficient at making my own stuff up.

Other questions?

JAMI: I have a comment and two questions. The comment is (I forget what number it was) in the thing you took us through. I just want to say that there was a point when I did the strategic session with you where I knew that you would not try to sell me on anything; and you didn't. But I kept trying to bring the conversation back. It was like, "Well, what if I did work with you."

GEORGE: I know. You noticed that.

JAMI: Yes, I did. And the more you moved away from it, the more I was circling back to it, actually. In one way, you present so much information. Obviously, no one can use it all at that moment. But it's the right kind of information. And so, I'm no longer thinking "this session." I'm thinking "going forward." And so, I see that I need to find a way to incorporate that into mine as well.

I'm so insistent on not selling. Practically, **[inaudible] 1:15:12.4** answered them because I don't handle that part well—if they want to work with me, whatever. So, that was the comment.

Two questions: One is, having results ready to give people is really good and I have lots of results. But I don't have results yet from my HEOB thing that I'm doing now, and I don't have a result from the paid strategic session that I haven't held yet.

So, what kind of results do **[inaudible] 1:15:47.3**

GEORGE: First of all, HEOB is an acronym for High-End, Outcome-Based Program which is a program that Jami has created. If you're creating a new program, product or service and you haven't had people go through that yet, what you do is you borrow results from other people working with you, and I have no issues with that. I don't believe there's anything unethical about it because who is delivering the program? You are! Have you helped people get results? Yes!

Unless you're totally brand new …

JAMI: So, just gradually replace it with results that are specifically from this …

GEORGE: Exactly!

JAMI: My other question. As you and Jill might have noticed, maybe not,but I'm in a total panic overwhelm state and you said you were going to address it next week. I don't have till next week. I need to know what to do about that.

GEORGE: If you find that you're in a panic mode … it can be any little thing and any unexpected thing that could trigger it, then, the first thing you want to do is to take a step back and maybe a physical step away from your computer.

It's commonly said and it may have become trite at this point but, literally, take three deep breaths. When I get frustrated, the last thing I want to do is take three breaths but it actually works. And what you want to do, if any of you have studied music or voice, is you actually have to let your belly stick out like you're pregnant and let the diaphragm drop down.

And something physiological actually happens when you take those three deep breaths. There's actually a change in the chemical make-up in your body. And next week, I'll take you through a different breathing technique. But that's the first thing.

Now, the second thing is to always remind yourself (and you might have to write this down. I guess, you could tattoo it on your forehead but, then, you still couldn't see it) that it's just not personal. Whatever is going on in your life right now that's frustrating even if someone has accused you of something, rightly or wrongly, just remember that whatever they're doing or saying or who they're being, it's not personal. It's simply how they respond and react in the world.

And if it's not you who happens to be the target, it would be somebody else or something else. That reminder alone has helped me in amazing ways in some very, very, very challenging situations. So, that's the first piece.

The next is, when I personally get in a situation where I cannot see straight and the only thing I can see is a swirl of red and I've enabled my nuclear launch code, I have trained myself to a sufficient level to claw my way to asking somebody for help.

I figured out that I'm not a good coach of myself. In fact, I'm probably the world's worst coach of myself. But I have enabled some sort of rudimentary back-up system that when I go nuclear either on a panic or just being furious, I'll ask for help.

I have a number of people who I know and trust and whom I can reach out to at a moment's notice. And it may be something related to my business; it may be related to something in my personal life. It's usually related to something my wife has said that has triggered me. It could be something related to parenting but it's more likely that my spouse dug up something that I didn't feel good about, and I reacted. And I forgot that it wasn't personal.

I think the most important thing is to have a safety net of people who can give you an objective read of where you are and help you to bring sanity and rationality to a situation where, otherwise, you may say or do things that you may live to regret. And that may actually be counteractive to what you're looking to accomplish. And this goes for everybody.

You'll frequently see these gurus out there who look like they were a one-man or a one-woman success stories. But if you really get to know these people and you dig down deeper and you listen closely, you'll find that they're not. Behind every single success story, there's usually, at least, one or more people who have been instrumental to help those people be successful.

Jami, did that help?

JAMI: Well, I guess. It's very good advice. It's that if you have an accumulation of things **[inaudible] 1:21:33.5** at one time, the breathing absolutely … and, yes, physiologically, it's true. I don't understand the idea of stepping away from my computer. That's impossible.

GEORGE: You do need to step away from your computer periodically. It must be scheduled in actually for you, in particular.

JAMI: Probably. But there are things that won't get resolved. And the end result, even if it's not personal, is that it's really undermining my abilities to do things. It's not just business; it's also personal—a fight with medical insurance. It may not be personal but, still, I have to live with it. And I suffer for it if there are a lot of them together.

And calming down is great but I don't know if calming down will necessarily show me a better way to perceive.

GEORGE: It actually will. When emotions are high, intelligence is low. It's inversely proportional. So if you have to make an important choice or decision when your emotions are high or when you're frazzled or when you're just not concentrating at your best, you're likely to make errors in decision making.

Now, having said that, if you find that you're just absolutely frazzled, the place to go is, one, to recognize that you are; and, two, to recognize that you're not ever, not in this lifetime, going to have every single thing handled. And you simply acknowledge that you're going to make the best with what you have to work with and who you are in that moment.

It doesn't have to be perfect. You don't have to have your strategic session perfected in the next day or two. What's going to make the difference for you are not the mechanics of this process that I've demonstrated for you that I'm training you in. And this goes for everybody.

What's going to make a difference for you is that you give yourself permission, you grant yourself the permission to be authentic with people, to hear what they have to say, to be thoughtful, to be respectful, and to share from your heart what it is that you have to offer and what it is that you have to say.

And given that everyone in this program has a lot of experience in doing what you do, even if you're starting a new business, you have a lot of experience, you have a lot material to work with; and you have a lot of life experience to draw on, if you simply share with people your view of the world, that's going to make more of an impact. And it will be a more remarkable conversation with people than if you have every single mechanical thing in place of the system that I've shown you.

This system—yes, there are mechanics to it; yes, there's a sequence to it. But, again, this system is, first and foremost, simply a way for you to connect with other people.

And there's order and form to it so it leads to a pathway. It leads to a result of you working with people and being paid based on value to do so. But, first and foremost, it's about allowing yourself to connect with others.

I'll tell you what. That very thought of connecting with others can be fear-invoking for some people because it means being willing to be seen for who you are. It means being willing to be vulnerable. And for a lot of us, we've grown up (myself included) trying to protect ourselves.

So, a lot of our behaviors even though they seem like they may be altruistic are really designed to protect ourselves from harm or what we perceive as harm or to compensate for shame or guilt or not being “good enough” or “something enough.”

So the key here is to give yourself freedom to do the best of what you have now knowing that if you are committed and you do the work, you'll continue to grow and you'll have more tools—a week from now, a month from now, a year from now.

Don't anybody think that you have to get your act together in the next 30 minutes.

JAMI: It brings up a question, though. This is all true. The personal connection can be the most valuable part of anything. But with the HEOB, the High-End, Outcome-Based Program, you're charging more. And I always wonder—do these clients want to see the vulnerable part or aren't they paying for not seeing the vulnerable part?

GEORGE: Of you, you mean?

JAMI: Yes. I mean, if you are unsure or if you are making a mistake or afraid you're going to make a mistake. But aren't they paying more to protect themselves from that?

GEORGE: No, absolutely not! They're paying more for the opportunity to gain freedom for themselves and, as human beings, we can pick up and sense when other people are being artificial and attempting to cover something up.

And so, it's important, as an expert, to be real; and being real means—look, you're going to make mistakes. Even with the highest of intentions, things won't always work out. And you simply acknowledge that it hasn't worked out and you do the best that you can—everything in your abilities and powers—to make it right because that's the real world.

And as a role model, as the expert delivering value and content, it's important for people to see the real world because, if not, one, your content won't be as effective and powerful; and, two, people will begin to think that—Oh, Jami is perfect. She's got it all handled. So, I guess, I can't do this because I'm not perfect like her. The reality is we're all perfect in our imperfection.

Of all people, I used to go around thinking I had to be perfect, and it just drove me crazy as a plastic surgeon because I couldn't get every single surgery to go perfectly; and a lot of patients demanded perfection.

JAMI: Well, yes, of course, they would. They want a surgeon to be perfect. You're not going to change their minds about that.

GEORGE: I remember driving down the freeway when this occurred to me: Perfection is my life as it is this very moment; and excellence which is what I am committed to in this lifetime is a process. Excellence is the process of fulfilling on my commitment.

Excellence doesn't mean I'm perfect all the time and that everything goes right all the time. It means I do the work to continue to fulfill on what I'm committed to which is growing myself and being a contribution to others.

That insight alone gave me tremendous freedom and it helped me to actually leave the field of plastic surgery.

I used to think—oh, if I were a better surgeon, a hundred percent of my surgeries would go well; and nobody would get infections; and everybody would be absolutely thrilled.

Not in this planet!

JILL: You have a couple of other quick questions from Sam and Veronica.

SAM: I'm not sure how quick this question is but I'll throw it out there. I'm just looking at how to actually design a strategic session, and what I thought might be helpful (if not today, maybe the next time) is if you could actually give us an overview of a strategic session but, perhaps, using a specific example from one offering a certain kind of service to kind of bring to life each of the point in this session.

GEORGE: That's very good. Let me give you a general starting point. I created the virtual workdays so we can actually work with the theory and apply it in real life; and we'll probably use you as an example if you're up for it when we do the workday.

But, as a general rule, what you want to in designing the strategic session is you want to start with: What are the different areas I need to know about where a client is either in their life or their business? What are some of the key areas?

And where I look first is my core client process. What are the different stages or phases that I might find people in? And what are the questions I need to ask to find out if they are in those stages or phases and what they're experiencing in any of those areas?

Those are the questions I would start with. And then, I also add in a section for—in the ideal world, where would I want to guide them? What kind of framework would I put these people into? What recommendations would I make?

And then, I'll create questions that will help me to discern whether they are following those recommendations, if they're open to those recommendations, and if they've tried certain things related to the recommendations I might make. And that helps me to understand: 1) Are they a good client to work with? 2) What actually has been working or not working?

So, another way to look at this, Sam, is to ask these questions: What has been working? What has not been working? And what have you tried? What have you not tried but considered? And a totally different kind of questioning which is, what would I as the expert recommend?

What I'd do, Sam, is go back to the training from last week and look at that diagnostic sparkline. And I think if everybody structures their strategic session using the topics that I wrote out in the diagnostic sparkline, it will give you a very, very powerful approach for creating your session. And I'll show you how to do that and I'll be happy to review everybody's session at our next workday as well.

Sam, for you, in particular … actually, everybody in particular, go pull down that diagnostic sparkline diagram; and then, start writing questions to fill in the different topical areas that are on that sparkline.

VERONICA: You've kind of answered my question partly but, then, it went on to another topic about the evidence piece. I am fairly new to my business of providing marketing advice. So my question was: Do I need to do some semi-free sessions with the promise of people giving me testimonials? And another thing I was worried about is really getting quantified results because one thing I'm struggling with being new in this kind of business is that things take time and if people don't have the structures to measure the results, then, they don't know **[inaudible] 1:34:38.5** the time delay when they realize it, "Oh, okay, she helped me."

GEORGE: What is your business?

VERONICA: I provide marketing and business development to advice salon owners.

GEORGE: What you're asking is that with your business which is relatively new, how do you get evidence that your session is valuable? Is that what you're asking?

One thing I would do especially if you're starting out is I would put my strategic session format together; and then, I would go ask people I know and trust if they would help me to test this and refine it. I'd get a friend or two individually and I'd take them through my strategic session and let them know, "I'm doing this because I want to practice this. I have some bugs to work out. And along the way, I want to get feedback from you about what's working and what's not working and what you'd recommend that I do differently."

And I would get a handful of these people until I became comfortable. I'd start with people I know and trust and let them in on what you're trying to do in terms of practice. Ask if they'll help you to practice this.

And then, what I would do with real clients is I would offer the initial sessions at no charge. I know this is teaching you how to do it for a fee; but, initially, I would do it for no charge.

In that way, it takes a lot of pressure off of you. When you're doing these sessions for a fee, there's a lot more pressure for you to deliver value. And if you're doing it for free, you can get away with a lot more—a lot more!

So, that's what I would do. And you'll know—when you're doing these sessions, you'll get a sense when you get really comfortable with the approach. You'll just feel it. You'll feel that your body will be more upright and your breathing will be deeper. You'll have a different level of alertness because you'll be actually listening more to the client rather than being worried about the mechanics of your session and being worried about what to ask next.

For you, two phases of practice: One, people in your inner circle who already know, like, and trust you. Ask them to be practice people for you. And then, when you're working with salon owners, offer initial complimentary strategic sessions. But tell them the same things. If they were going to pay for it, tell them the very same outcomes and benefits they would get from the session as if they were going to pay for it. But offer it for free.

VERONICA: Okay, that's helpful.

GEORGE: In other words, deliver the same "knock your socks off" value whether they're paying you or not. Thanks for the question, Veronica.

Jami, there was something you said before you said your two questions. I was going to say something about that and I didn't write it down.

JAMI: **[inaudible] 1:38:40.0** before you were done with the session.

GEORGE: There you go! I want to say something about that. This is important for everybody. When I do a strategic session, I usually look for clues that people are ready to share what it might be like to work with me. And it's taken a while for me to develop the sensitivity to know when this is because it's possible to go for far like Jami does of turning people away, essentially, right?

JAMI: It's my business model.

GEORGE: It's your business model and we've got to rectify that quickly. Jami shared that there are a number of points, two or three times, where she kept asking, "What would it be like to work with me?" and I didn't address the question directly; I talked around it.

And the reason I did that was because I wanted to emphasize certain key points about where I wanted her to focus strategically as well as tactically. And I wasn't willing to take the conversation off on a tangent about what it would be like to work with me until I felt confident and comfortable that I had landed and emphasized the point about the strategies and tactics that I wanted Jami to get even though I knew she was ready for it. I wanted to solidify the strategies and tactics that I was recommending.

I recognize that the ability to do that comes with experience. It's a finer point and it's a nuance because at this stage of beginning to learn this system, when the client says, "What would it be like to work with you?" most of the time, you're going to jump on it and that's your cue to talk about the programs that you offer.

And so, what I recommend in the beginning phases of learning this system, when they ask what it would be like to work with you, is to go ahead and tell them.

And as you get more comfortable and confident with carrying out these sessions, you will naturally be able to understand when to defer that question and even go so far as to acknowledge it: "Jami, I'm going to tell you about what it would be like to work with me in a moment; but, first, what I want to do is blank, blank, blank."

What I'm also saying is: Avoid being so over eager that you jump at that first opportunity to talk about your programs, products, and services. The mantra here is "first, be of service." And even if they're asking for how you work, make sure you've delivered with great clarity what the road map is that you recommend for them.

Thanks for remembering what that was, Jami.

JAMI: It's even counterproductive, in a way, especially as we establish this to allow it to get sidetracked because there's a point and a purpose in the flow which **[inaudible] 1:42:21.9** working on very hard; and if you jump ahead, you miss the opportunity to deliver the full value.

GEORGE: Exactly! So, that's a very strong point, Jami. The important thing that Jami pointed out was flow. You, as the expert, are in charge of the flow. You're in charge of how the session goes. You're in charge of the energy of the session.

It's possible that some clients will inadvertently try to sidetrack you; and it's very easy to get sidetracked if you're not aware of where you're headed and the energy of the session. So, your job is to be the director here. You're the guide. You provide the framework.

I'll give you an extreme example of where flow can get deflected. You start out the strategic session and one of the first questions the client has is, "So, Megan, what do you charge?" And this is the first five minutes of the session. And what most people who are untrained will do is say, "Oh, what I do is I charge $125 dollars an hour" and blah, blah, blah.

That's a mistake—way too early to be talking about what you charge because the client has no experiential idea of the value that you have to offer. You haven't even had a chance to demonstrate that value and deliver it from your strategic sessions.

And so, in order for you to maintain the flow, you need to recognize that this is happening and put that question in the appropriate place in your sequence.

And I'd acknowledge it like this because this has happened to me before. I'll say something like, "Well, at this point, what I charge and what I have to offer don't really matter because the purpose of this session is to give you a road map for where to start and where to invest your time, money, and energy. And I don't know yet if and how that involves me.

So, if and when it's appropriate, I'll share with you what it might be like to work with me and the fees that are involved. But not yet—it's too premature. So, let's get on with really mapping out a game plan for you."

It took me about 45 seconds to say that. It acknowledged the concern or the question. I'm not avoiding it or sidestepping it, and I'm just letting them know, "This is the primary focus of this session."

JUDY: Can I just comment on that? I had a prospective client ask me to do that very recently, and I just told her, "I don't yet know what's going to be involved in getting to where you want to get, and I don't even know quite where you want to get yet. So, I need to do a strategic session first in order to really know what the map is and what's going to be required."

GEORGE: Bravo! I love it.

JUDY: And she was great with that. She was totally cool. But if it's a strategic issue, it's really difficult to figure out what the cost is going to be.

GEORGE: Absolutely! That's very good. And when you address it the way Judy just articulated it, it's reassuring to the client. At other than a conscious manner, it's reassuring because they are reassured that you're going to take care of them. You're not going to rush ahead and just like, "Oh, wow! I can get a new client; I can land a new client" at whatever fee it is. They are reassured that your priority is to deliver a game plan for them. You're not rushing ahead trying to make a sale and close the deal.

I want to address all the questions we have. I just want to acknowledge that we have gone past our time. I should have acknowledged it 20 minutes ago, but I'm going to stay and answer all the questions that everyone has.

Megan has a question. What kind of conversion rates should you be expecting? A very good question!

Where I would start is: What are your current conversion rates without this system? Get a read on that or guesstimate it.

In my experience, most people will increase their conversion rate initially by, at least, 10% to 20%. If it stays the same as previous, I don't have a problem with it. When that has happened with people, what has also occurred is that they have not wasted time doing sessions with the tire kickers.

MEGAN: Two things for me: Having been applying this process for some time, I would say that my conversion rates haven't gone up, so to speak. But what has happened is that one, I've spent a lot less time (as you just mentioned); and, two, my client selection process is much improved. And so, I'm not signing on people who are driving me crazy or are just a huge drain for me. And, initially, the intake process was not fee-based.

The way that I have set this up is that, essentially, my strategic session is a set of assessments **[inaudible] 1:48:30.1.** And so, whether or not they actually convert into clients, I still have a revenue-generating vehicle that I know provides a lot of value.

So, that benefit has been established. But, I guess, what I'm trying to understand right now is that I'm at about a 65% conversion rate. Of the 14 people with whom I've had a conversation, with, 9 invested in my strategic session.

And so, I'm not sure if that's actually, perhaps, a little bit lower than I'm accustomed to; but, certainly, the benefits of not having, shall we say, not good-fit clients and the revenue generation and the time benefits will outweigh any reduced conversion rates.

But I'm just wondering, is there sort of a metric to say that we should be shooting for 80 or …

GEORGE: Very good question! Before I address that, you bring up a good point. Even if your conversion rates don't go up, what I've observed with this approach is that the quality of clients that you end up working with is a lot higher. If this system is done properly, it selects a higher caliber of clientele.

Having said that, there are two conversion rates to be looked at—one is your conversion from snapshot to paid strategic session; and then, the conversion from paid strategic session to longer-term client.

In my experience, from a snapshot to paid strategic session, my conversion rate is about 90%; and from a paid strategic session to client, my conversion rate ranges from 75% to 90%.

When I was doing free sessions, I didn't have a snapshot but my free strategic session to client conversion rate ranged from 15% to 30%. I think it actually settled in around 20.

So, I don't know what's going to end up for you, ultimately; but I think a decent target would be a snapshot to strategic session conversion rate of, at least, 60%.

MEGAN: Okay, I'm at 65% right now.

GEORGE: That's fine.

MEGAN: But 80 … you're hitting 90 so it's **[inaudible] 1:51:45.7**

GEORGE: I'm very selective. And if I don't think that there's any value for me spending time with somebody even in a casual conversation, I don't even offer sending them a snapshot.

That's why my conversion from a snapshot to a strategic session is a lot higher because I'm very selective at who gets the snapshot.

MEGAN: The way that I do mine is that as soon as someone inquires, I send a snapshot. I say, "Thanks for your inquiry. I'd love to learn more." And I send them the snapshot so that they get that initially. But, actually, right now, I have people, based on what I see from the snapshot, who I really don't think are going to be clients; and I feel like I end up having the conversation and doing the strategic session even thinking—well, maybe they'll invest in this strategic session but they certainly won't be long-term clients.

Should I not be having conversations with people who I don't think are going to translate into long-term clients? And then, if not, how do I gracefully tell someone without even talking with them that I'm not the person for them?

GEORGE: If I don't think I can provide significant stand-alone value from a strategic session. I don't even offer it to them and I would give them other potential resources—books to read, other websites, other people's programs, if appropriate.

Or if don't have anything to offer them which is pretty unusual, then, I would just say, "Hey, you know what, I've looked over your snapshot and given your situation, I don't think I'm the right person to help you.

MEGAN: What it really comes down to, oftentimes, is that I can see that they're … I support professionals and consultants. So, if the person is unemployed right now and looking for a job or maybe they're working part time or maybe they've just graduated from college and have less than five years experience, the likelihood of them being able to afford my services is very low.

I don't want to be dismissive to these people and say, "I don't think you can afford my services." But right now, I'm having conversations with these people knowing that, rolling the dice, maybe they'll invest in a strategic session but not more than that.

So, I don't know if I should be wasting my time with that.

GEORGE: You have to judge that on an individual basis because here's the thing. Even if someone can afford working with you moving forward on a longer-term basis, you have to be able to read. Can you provide enough value for that initial strategic session that gets people pointed in the right direction?

MEGAN: I provide tremendous value. It's not that. It's whether or not, in some cases, they can even afford the strategic session because, as you know, my strategic session is actually more than one session. It's a two-session package.

GEORGE: If they can't afford even the strategic session, send them to other free resources.

MEGAN: But I don't know that. I can guess but, at that point, when I think that they're probably not even going to be able to invest in a session, how do I gracefully decline from having a conversation with them?

GEORGE: "Based on your responses, I don't have any resources for you and I know from past experience of working with other people who are coming from your similar situation that I have just not been very effective at helping them."

I would make it all about me and nothing about them—"This is just not my niche. This is not my sweet spot. I'm most effective when people have this situation," and list out what that situation is.

MEGAN: Do you think it would be a good idea to include something like that **[inaudible] 1:56:23.5** snapshot?

GEORGE: No. Not yet because what people can do is they can take your criteria and make up their own story that makes it look like they fit your criteria. You don't want that to happen on an unconscious level.

MEGAN: I see your point. Thank you very much. That's very helpful.

GEORGE: The other comment I want to make … I gave you your snapshot to a strategic session conversion rate. I think that anywhere from 50% to 60% is a decent target. And then, for your conversion from paid strategic session to paid longer-term client, I think anywhere from 50% up is a decent target.

And I believe that if you continue to refine this, you can get upwards to 70%, 80% or 90% consistently. Use me as a benchmark. That's where my range is—about 80% to 90% conversion.

And it depends on where you measure this because, sometimes, I'll do a session and the person doesn't turn into a private client for another two or three months.

But just because they don't say "no" immediately or a few days afterwards, it doesn't mean they're not going to become clients.

I once had a client who became a client one year later. You don't want to judge your success or failure just on a very short time frame.

I think I've addressed all the questions. I want to acknowledge everybody for sticking around overtime. Our next session is a live coaching session. It's next Tuesday. It will be October 4 at 9 o'clock Pacific time.

And our next virtual workday is actually Thursday, October 13 at 9 o'clock Pacific.

All right, everybody! Thanks for sticking around for an extended session, and we will talk again next Tuesday.

Take care and have a productive day.