

# 3d Business Growth Workshop

How to Design Your Own Introductory  
“Useful but Incomplete” Strategy  
Sessions That Turn Sceptical Prospects  
Into Happy, Repeat, Fee Paying Clients



3d Consulting Services

## 3d Consulting Services

*Magnify Your Mission : Multiply Your Reach*

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# **3d Business Growth Workshop**

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“Useful but Incomplete” Strategy  
Sessions That Turn Sceptical Prospects  
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## **Training Notes**



**3d Consulting Services**  
*Magnify Your Mission : Multiply Your Reach*





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# Introduction

Let's assume that you've built up an engaged database of subscribers and prospective clients. You're also working hard to provide them with valuable content, which establishes your reputation as an expert. You may even have made a few paid offers to your community. But are you making the revenue you really want? How many of the people on your list have become paying clients?

One of the key definitions of a business is making a healthy, sustainable profit. After all, if you only just cover your costs, or even lose money, then you don't have a business - you have an expensive hobby. And if you're making only a small profit that doesn't meet your own needs, then you're never going to feel satisfied with your business.

In order to make the level of profit you desire, you need enough people to buy what you're offering, and that involves selling. For many small business owners or solopreneurs, the idea of selling is uncomfortable. They equate it with being pushy and using 'hard sell' techniques. They shy away from it and try to play it safe with low ticket products or services that are easy to convert.

While this thinking is understandable, especially if the product is *you*, it will never get your business to the next level. So how can you make the sales you need without sounding like a used-car salesman? How can you provide the service your clients want while staying true to yourself?

In this course, we'll answer those questions and more. You'll learn the powerful skills of selling in a 'non-salesy' way, so that it's a natural step for clients to say "yes" to your offers. You'll conquer your fears about selling and you'll create a system that puts your sales process on autopilot.

## **Learning Objectives:**

By the time you complete this course, you'll be able to:

- Identify your current rate of converting prospects into paying clients so you can decide what needs to improve
- Pinpoint what your prospects want so you can match your offer to what they are looking for
- Define the sales figures needed to meet your revenue goals so you have a clear target to hit
- Tackle the mindset issues that block you in the sales process, so you can put aside the gremlins in your head and sell with confidence
- Discover the value of using free strategy sessions, as used by multi-million dollar influencers, to convert prospects to clients, without being ‘salesy’
- Use the key ways to make your free sessions inviting so that you’ll get the sign ups you need to meet your targets
- Describe your offer and the value it brings to the table, making it a natural next step for people to say “yes”
- Set up systems that make it easy for clients to book sessions and pay for programs
- Skillfully conduct high-converting strategy sessions that provide value to prospects while leading naturally to more sales
- Confidently address common concerns that may arise during a sales call so that you can give answers to your clients to reassure them about their purchase
- Onboard clients in a clear and efficient way so that they’ll feel welcomed and engaged from the start
- Create multiple channels to entice qualified prospects to sign up for your free consultation, so that you only speak to people who are interested and ready to buy
- Make a plan to consolidate your sales calls skillset, so you continue to make sales that match your clients’ needs and increase your business revenue

This course is broken down into 12 modules to take you step-by-step through the process of attracting and enrolling clients into paying programs.



The modules follow a logical order, so while you can skip around if you want, it's best to work through them one at a time.

As we go through each module, use your Action Guide to help you complete the Action Steps at the end of each.

## ***Setting Expectations:***

Before starting this course, just take a minute to think about what you really want to get out of it.

In the space below, write down three skills you expect to gain.

1.

2.

3.

Once you're clear about what you want this course to deliver, we can get started.

# **Module 1 - Starting with the Business Essentials**

You’re in business to make a profit, but maybe that’s not happening yet to the level you want. You might already have a database of subscribers and a good reputation for providing valuable content to your followers. But are you making the sales you need to reach your income goals? The chances are that you haven’t yet found the key to turning those engaged prospects into paying clients.

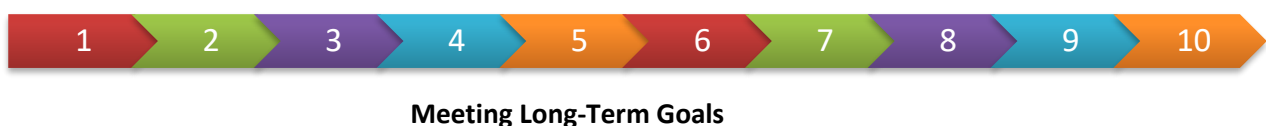
In this module, we’ll start at square one and identify the obstacles that are blocking you. You’ll build up incrementally through the course to a place where you are making consistent sales to loyal, satisfied clients who sing your praises and recommend you to others.

## **Your Current Business**

Before we dive into the details, let’s look at where your business is right now.

Where would you place yourself on a scale of 1-10 (where 10 is off the scale of happiness) on the following?

1. Satisfaction
2. Revenue
3. Meeting Long-Term Goals



## **How Do You Currently Turn Prospects into Clients?**

We’re starting off assuming that you have at least a few paying clients already, but if you don’t yet, that’s fine. You’ll be getting them soon enough if you follow the modules in this course. It doesn’t matter where you’re starting out; you can start bringing in income as soon as you’re ready.

If you *are* already making some sales, they may be ad hoc and at the expense of sheer hard work, persistence, and often stress. For example, you spend weeks planning the launch of an online program and virtually drive yourself into the ground, and you end up with one or two sales (or none). Sound familiar? It happens all the time, and it’s happened to many business owners before you.

Start by answering these 3 questions:

1. Who are your prospects?
2. Are they your ideal clients?
3. Do any of the business basics need tweaking before you move on?

## **Marketing Has Changed**

In recent years, the Internet has revolutionized the world of marketing. Marketers can no longer use the same techniques today that worked ten years ago. The attitudes and behavior patterns of your clients have changed drastically, and in order to be successful you have to change with them.

You also have to know them, so if you haven’t yet identified your ideal client profile, then this is the time to do it before you go any further. Once you know who your ideal clients are, you can figure out what their needs are and which of these needs remain unsatisfied. Then, you can offer them something they really want to meet these needs.

## Get Focused on the Right Thing

To have a successful, profitable business, you need to focus on bringing money through the door. Whenever you do something, ask yourself, “Does this activity bring money into my account?”

Or, as is often the case, is the activity an example of “creative avoidance”? In other words, are you avoiding making sales?

Before you throw up your hands in horror, take a moment to reflect on how you spend your time, and *be honest* with yourself.

Setting up websites, planning courses, upgrading your branding, talking to prospects on Facebook, tweeting, and so on are all examples of creative avoidance. They may bear fruit later on, but they are not activities that will put money in the bank right now.

Follow what we’re doing in this course and you can attract income straight away, even without a website or an online ecommerce system.

### 3 Key Things You Must Do to Have a Profitable Business:



1. Generate leads
2. Have a process to turn prospects into paying clients
3. Once that process is honed, systematize it so you can ‘rinse and repeat’

We'll focus on the second two steps. For the purposes of this course, we're going to assume you have your initial lead generation set up. You can always go back and add or adjust it after you've learned more.

## **Blocks to Successful Selling**

At this point, you may have some successful methods to generate leads, and that's great.

But getting people to raise their hands and say, “Yes, I want more information” is different from making a sale to that person and turning them into a paying client.

## **Think ‘Serving’, not ‘Selling’**

We'll look at the mindset issues that often get in the way of successful selling in a later module. For now, change your thinking about the word ‘selling.’ Try to see selling as serving, because that's what it is: matching what you have to people's needs so you help them overcome a challenge.

When your offer matches their need, you don't have to persuade. There's no convincing required. You can be your authentic self and you can get results.

## **Accept Your Competition and Move On**

Yes, there *are* other people doing what you do, (but not in the way that you do it, because you are unique). Conduct some due diligence and research your nearest competitors.

Here's an exercise to help with this:

- Who and where are they? What is their pricing structure? What pricing strategy are they currently using?
- Find out exactly what they provide.
- Prepare a spreadsheet with the information so you can add to it or update as time goes on – this is a valuable database.



- Map out the difference between your product/service and theirs, especially that of your 'nearest' competitor. Small changes, especially in client service, can make all the difference between competitors offering roughly the same product/service, so you need to know this information.

**Then STOP comparing your service/product to others.** Remember that your clients and prospects will probably never even see what it is you're comparing yourself to anyway. Stop scouring the competition and focus on your own business.

**Learn to over-deliver and you will never lose sleep over what other people are selling.**

## **Don't Be Scared about the Numbers**

Another obstacle that gets in the way of having a successful business is that many business owners aren't very interested in the numbers of their business.

But numbers are nothing to be afraid of. *All* successful business owners agree that you have to know and understand the numbers of your business to make a success of it.

## **Conversion Rates**

The number you need to work out first is your conversion rate, which means how much it costs you to acquire a new paying client.

If you're not sure how to calculate this, here's an easy way to do it:

**Conversion Rate = Total Number of Sales ÷ Number of Leads x 100**

(A 'lead' is any person who is potentially interested in purchasing your product or service – for example, the people on your list.)

**Example:** Let's say you made 20 sales last year and you had 100 leads. Your conversion rate would be 20%. (20÷100x100)



If you haven't made any sales yet, then obviously your conversion rate is 0%.

In the next module, we'll look at your financial goals and work out how many sales conversations you need to have to meet your revenue targets.

### ***Key Takeaways:***

1. When you change your perspective from 'selling' to 'serving,' you'll find that converting a prospect to a paying client becomes a natural progression.
2. Getting comfortable with the numbers in your business will keep you on top of what's important.

### ***Brainstorming Activity:***

1. **Quick Win:** Calculate your conversion rate using the formula:

$$\text{Conversion Rate} = \text{Total Number of Sales} \div \text{Number of Leads} \times 100$$

<i>No. of Sales</i>	<i>÷</i>	<i>No. of Leads</i>	<i>× 100</i>	<i>Conversion Rate</i>
	/			

## **Brainstorming Activity (cont):**

### **2. How you currently turn prospects into clients?**

*Who are your Prospects?*

*Are they your Ideal Client?*

*Do any of the business basics need tweaking before you move on?*

### **3. Competitors exercise. Answer the following questions**

*Who and where are they?*

*What is their current pricing structure?*

*What offers do they make?*

*What else do they provide?*

Prepare a spreadsheet with the information so you can add to it or update as time goes on – this is a valuable database.

Map out the difference between your product/service and theirs, especially that of your 'nearest' competitor. Small changes, especially in client service, can make all the difference between competitors offering roughly the same product/service, so you need to know this information.

## **Module 2 – Know What Your Clients Want**

Having prospects who want to know more about how you can help is an important step towards a successful business.

Now you need to go beyond that to discover exactly what it is they want.

In this module, we'll look at ways to do that so you don't just assume you know what they want - you actually do.

### **Establish Your Clients' Wants**

We tend to talk about 'client' or 'customer needs', but really we should think about 'wants', not 'needs.' Here's an example: You might *need* to lose weight but you might not *want* to.

You must ask your clients what they *want*. Even multi-million dollar entrepreneurs ask this of their clients. This isn't a one-off process – you need to be doing it constantly.

The simplest way to find out what people want is to ask them. You don't need an excuse to keep in touch with your clients, as a successful business owner does this automatically. One of the biggest mistakes marketers can make is to assume. In order to really understand your clients, you need hard data that they provide themselves. Listen to customer feedback about your company, as well as the conversations they have online.

### **Here's an Exercise to Get You Started:**

Speak to **3 past clients** or people you know are interested in your work. Choose your ideal clients if possible. Explain to them that this is a simple survey to find out more about what might help people move forward.

Ask them these four questions:

What is your biggest challenge?

If I could wave a magic wand and have things the way you want them in the area of [their area of interest], what would you want?

What would you be prepared to do to have that?

What would it be worth to you to have that?

1. What is your biggest challenge?
2. If I could wave a magic wand and have things the way you want them in the area of [their area of interest], what would you want?
3. What would you be prepared to do to have that?
4. What would it be worth to you to have that?

Record your findings. Review the results and write down what you have learned about your client’s desires.

## **Understand What Your Clients Want**

You can learn about people’s thoughts and feelings through blogs, blog comments, forum postings, and social media sites. Even better, you can solicit the specific data you need by directly asking them to take a few minutes to give you feedback. Online surveys are incredibly easy to conduct these days, and there are free tools, such as Survey Monkey, which walk you through it step-by-step.

Don’t only think about what they *want*, but also what your clients *don’t* want. There is always risk involved in making purchases. If you can imagine your clients' fears and concerns, you can address them before your clients have a chance to worry or object.



## **Put Yourself in Your Clients’ Shoes**

To add to the hard data, put yourself in your clients' shoes. You will quickly understand what they're looking for.

You’re a customer too. Use your own experience and draw on that.

Think about any company you deal with on a regular basis, and analyze your feelings about that company. Then, try to discover why you feel that way.

A few questions to ask yourself are:

- What do you like or dislike about them?
- What makes you want to go back and do business with them again?
- Is their image friendly and professional?
- Can you easily get what you want from them, and are interactions with them smooth and seamless?
- What does the company do when you're not satisfied with their products or services?

Through these questions, you can understand as a client what makes a business's service good or bad. You can add this information to the data you gathered from your prospects.

Think about Apple. They make lots of money but create such a great experience for customers in terms of superior products and a superior buying experience that people buy the latest iPhone or iPad whether they need it or not.

## **Identify Your Revenue Goals**

Let’s turn the focus on you for a minute, as your needs are also important.

Do you know what your revenue goal is for the next 12 months? You might be very clear, or you may just have a vague idea.

As we mentioned in the last module, successful business owners know their numbers. Your revenue goal is one of the numbers you need to know. It makes

sense, doesn't it? If you know where you're headed, you can tell if you're getting there. And we mean a specific goal for every month, not just a vague annual figure. This is *your* business, and therefore you choose how much you want to work.

Below you'll find a process for calculating your monthly figure.

## **Work Out Your Monthly Financial Goal Step-by-Step**

**Step 1.** Make a list of all your expenses for your business *and* your life. Don't forget things like insurances, professional fees and so on as well as going out, clothes, credit card payments, and other 'leisure' costs. It's time to be honest with yourself so don't leave anything out.

**Step 2.** Eliminate regular payments for things that are no longer used or used infrequently like subscriptions to a magazine you don't read, membership sites you don't use, and so on. We don't want to waste money on non-essentials.

**Step 3.** Add up everything to get to a monthly figure (so any annual expenses need to be divided by 12).

**Step 4.** Multiply your monthly figure by 1.3 to give you a 30% buffer which will include a portion for tax you'll need to pay on income, and a reasonable profit.

Don't panic when you see the end figure if it's a lot more than you thought. It's just numbers on a page and numbers don't have feelings attached.

## **Key Takeaways:**

1. You must find out what your ideal clients want so that you can match your offer to this.
2. It makes sense to have clear financial goals so that you can keep track of your progress and make adjustments if you get off track.

## **Brainstorming Activity:**

1. **Quick Win:** Put yourself in a client’s shoes. Think about any company you deal with on a regular basis, and answer the questions in the boxes below.

*What do you like or dislike about them?*

*What makes you want to go back & do business with them again?*

*Is their image friendly & professional?*

*Can you easily get what you want from them, and are interactions with them smooth and seamless?*

*What does the company do when you're not satisfied with their products or services?*

## **Brainstorming Activity (cont):**

2. Choose three clients to speak to and ask them your key questions (refer to the module). Record your findings below.

*Client Name*

1.

---

2.

---

3.

---

*What is their biggest challenge?*

1.

---

2.

---

3.

---

*What do they want?*

1.

---

2.

---

3.

---

*What are they prepared to do?*

1.

---

2.

---

3.

---

## **Brainstorming Activity (cont):**

*What would it be worth to have (what they want)?*

**1.**

---

**2.**

---

**3.**

**3: What patterns do you notice?**

**4: What have you learned about your clients' wants?**

**5: Work out your monthly revenue targets using process described in the module.  
Use this checklist to mark your progress.**

Task	Complete?
Make a list of business expenses	
Make a list of personal expenses	
Eliminate regular payments	
Establish yearly total and divide by 12 for monthly total	
Multiply figure by 1.3 to include 30% buffer	

Monthly Revenue Target:	
-------------------------	--



## **Module 3 – Develop a Non-Salesy Mindset for Success**

It's all very well collecting hard data as you did in the last module. It's useful, and it's necessary if you're going to be able to design programs your clients want.

But there's an inner game going on here too. Whatever services you want to offer, you won't be successful in making sales if you allow negative feelings about selling to hold you back.

In this module, we'll confront some of the mindset gremlins that can trip you up and stop you from making the sales you need, and that your clients need too.

### **Confront the Fear**

When you start out it's natural to be uncomfortable about selling. If this doesn't affect you, then you're one of the lucky ones.

The fear of selling usually comes from the fear of being rejected, the fear of not being good enough, and the fear of having nothing of value to offer.

Let's highlight some of the most common ones:

- You fear people saying 'no', so you avoid anything to do with direct sales, (this fear of rejection is very commonplace).
- You think, *“I don't have anything people will want to pay for.”* This is because you don't value yourself or your product, and so you aren't asking for the business.
- You think selling equates with being sleazy, wrong, pushy, or dirty. You've been on the receiving end of being hard-sold and didn't like it. And you haven't found a better way to make sales – until now.

You may or may not be aware of these fears even though they are *very* common in entrepreneurs at all levels of income. They are what stop you from making your offers and getting paid for them.

Do this exercise to uncover some of *your* internal blocks. This will really pay off in the end:

When you hear the word “selling”, what’s your immediate reaction?

- Do you identify with any of the three points above?
  1. *“I don’t want people to say ‘no’ when I propose a sale”*
  2. *“I don’t have anything people will want to pay for.”*
  3. *Selling is “sleazy, wrong, pushy, dirty” (or similar)*
- Can you identify other attitudes you hold to selling? Write them all down
- If someone said, ‘You’ve got to get selling today’, how would you feel?

To become more aware, think about the times you put off following up with a hot prospect or calling a company to get an answer to your proposal and found something else to do like look at your Facebook page. Or you might suddenly have found you needed to tidy your desk rather than phone a prospect.

Does this resonate with you? If so, you’re using ‘creative avoidance’ to sidestep direct selling and this shows you have fear at some level on this issue.

BUT there’s no need to spend years in therapy to find out the cause – **accept that the fear is just a story you’ve been telling yourself and make the decision to rewrite it.**

## **Ways to Rewrite Your Fear Stories**

### **1. Value Yourself and Your Product**

If you don't value yourself and your work how can you ever expect clients to see the value in what you are selling?

Being confident in what you're selling is the *same* as being confident in yourself, especially if you are in a service sector like coaching, consulting, or training, because often the 'product' you are offering *is* yourself.

So much of what we do as small business owners relates back to ourselves; we are still close enough to the client to feel the rejection, (or the joy) so our state of self-confidence influences how we act when selling. If we aren't 100% confident in our product or service, we can pretend all we like but the client won't be duped.

Stop being overly critical of yourself. Your clients aren't being as critical as you are. *Nobody* is being as critical as you are.

## 2. Value Inventory

People usually have much more to offer than they give themselves credit for. This is a great time to start a value inventory. It's a list that details the value you deliver to clients as part of your program, for example accountability or more free time. Keep this list with you and add to it whenever you think of something new. Get in the habit of referring to it whenever you are feeling a lack of confidence about your business or your offers.

Spend at least 10-15 minutes writing down everything that comes to your mind that you offer your clients. Don't judge any of your responses; write everything down.

Here are a few ideas to get your mind cranking:



## Give Yourself an Injection of Confidence

You’ll be surprised how many business opportunities are right under your nose.

Try this exercise to **get clients in the next 48 hours** and see what comes up.

1. Make a list of anyone you’ve sold to or had a conversation with recently relating to your business or business idea.
2. Speak to them and ask them how things are going.

Use questions like:

- What’s your dream in X area? How would you ideally like it to be?
  - What’s stopping you from getting it? What’s your biggest challenge at the moment?
  - If I could help you change that what would it be worth to you?
3. If you find there’s a fit with what you can do, then make an offer. If you think it’s too soon and you’re not ready, then say something like “I have something coming up that would help. Let’s arrange to talk on X date so I can tell you more.”

### ***Key Takeaways:***

1. You need to unblock any negative feelings you have about selling so that you can be confident and successful in making sales.
2. Knowing your market and your competitors makes sense, but don’t be tyrannized by them.

## ***Brainstorming Activity:***

### **1. Quick Win: Value Inventory**

Spend at least 10-15 minutes writing down everything that comes to your mind that you offer your clients. This could include things such as those mentioned in the module.

- |                                       |   |
|---------------------------------------|---|
| ➤ Accountability                      | ➤ Increased profits                             |
| ➤ More efficiency                     | ➤ Improved relationship with significant others |
| ➤ Better parenting skills             | ➤ More free time                                |
| ➤ Inner peace                         | ➤ Less overwhelm                                |
| ➤ Forgiveness                         | ➤ Better employees                              |
| ➤ More impactful communication skills | ➤ Improved health                               |
| ➤ More savings in the bank            | ➤ Early retirement strategies                   |

*What do you have to offer...?*



## **Brainstorming Activity (cont):**

### **2. When you hear the word “selling”, what’s your immediate reaction?**

- Do you identify with any of the three points in the module?

<i>“I don’t want people to say ‘no’ when I propose a sale”</i>	
<i>“I don’t have anything people will want to pay for.”</i>	
<i>Selling is “sleazy, wrong, pushy, dirty” (or similar)</i>	

- Identify other attitudes you hold to selling? Write them all down!


- If someone said, ‘You’ve got to get selling today’, how would you feel?

--

## ***Brainstorming Activity (cont):***

3. Get clients in next 48 hours. Make a list of anyone you’ve sold to or had a conversation with recently relating to your business or business idea.

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

## **Brainstorming Activity (cont):**

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

<b>Name:</b>	<b>Contact Info:</b>
<b>Notes:</b>	

Speak to them and ask them how things are going. Use questions like:

- What’s your dream in X area? How would you ideally like it to be?
- What’s stopping you from getting it? What’s your biggest challenge at the moment?
- If I could help you change that what would it be worth to you?

If you find there’s a fit with what you can do, then make an offer. If you think it’s too soon and you’re not ready, then say something like “I have something coming up that would help. Let’s arrange to talk on X date so I can tell you more.”

## **Module 4 – Strategy Sessions:** **Your Winning Formula**

Now you’re feeling more confident about yourself and what you have to offer to clients. It’s time to find a process that will allow you to remain true to yourself while still making sales.

And that’s what you’ll learn about in this module.

### **What Successful Influencers Do**

There are many ways to make sales both on and offline. You’ll have come across the big players who have million dollar launches or who charge 10,000 per hour for one-to-one coaching, (or more).

They didn’t start out like that. They have built their reputations and, importantly, their email lists over time so that they have access to a huge global audience of interested potential clients.

Whilst some of them only run big online programs, many of them still work with individuals and use the sales process you’re going to learn to enroll clients. Okay, so they may have a team of associates who do the actual calling, (though not always) but the process is the same.

That’s interesting, isn’t it? But you’re saying “Yes, that’s all very well but I’m not a known multimillionaire entrepreneur.”

### **You Are an Expert**

You may not be bringing in millions (yet), but to those people on your list, your followers on LinkedIn, those who ‘like’ your Facebook page and so on, you’re already an expert.

People like to buy from experts. We look up to experts and feel that they must know

what they're talking about so we must be buying from the best – at least at a subconscious level this is what is going on.

Own your expert status and do all you can to develop it.

## **Start Out Getting Sales the Best Way**

The best (and quickest) way to convert your nurtured relationships into paying clients is to have conversations with them. You can be sure if the big shots are doing this, then it works.

Yes, it means picking up the phone, jumping on Skype, or going for coffee. Yes, you will have to actually TALK to people. There is no way around this if you want to make a level of sales that will get you to your revenue goals.

Sometimes the process will be triggered by the potential client. Their problems or issues will reach a stage where they need to take action - and if you've done your nurturing right, you'll be the first person they turn to.

Sometimes though, *you* make the approach and invite them to a free initial consultation. These are also known as strategy sessions, discovery calls, breakthrough coaching calls, or by other titles.

We'll use the term 'strategy session' in this course, as it's proactive and the name suggests they'll get value – which they will.

## **Strategy Sessions**

Strategy sessions are the way to turn high-potential prospects into paying clients. This will make a huge difference to your sales results *without* yucky selling.

Don't panic! We'll go through the process in detail in a later module and give you scripts you can adapt to your own situation.

Just for now remember, you're not making these offers to just anyone. You're

## [How to Design Your Own Introductory “Useful but Incomplete” Strategy Sessions](#)

focusing on high-potential prospects who’ve indicated their interest by grabbing your lead magnet, and with whom you’ve been nurturing a relationship.

The chances are that if you make them a relevant and valuable offer, they’ll have at least some interest in it.

### **Your Experience with Strategy Sessions**

You may not have been using strategy sessions yet, but you’ve probably been on the receiving end of one of these free consultations.

Reflect on this by answering the following questions:

1. What enticed you to sign up for a session?
2. What did you like about the session?
3. What didn’t you like?
4. What was the deciding factor in your decision to purchase? If you didn’t buy, what was the reason?
5. Will you go back to this person again if you have a future need? Why?



### **The Way to Get Big Results**

Using strategy sessions can work for you now if you want to make an extra 1-5k per month, or later when you want to scale up and make 20-40k extra.

Their purpose is to sell higher priced programs and that means you need to make fewer sales to reach your targets.

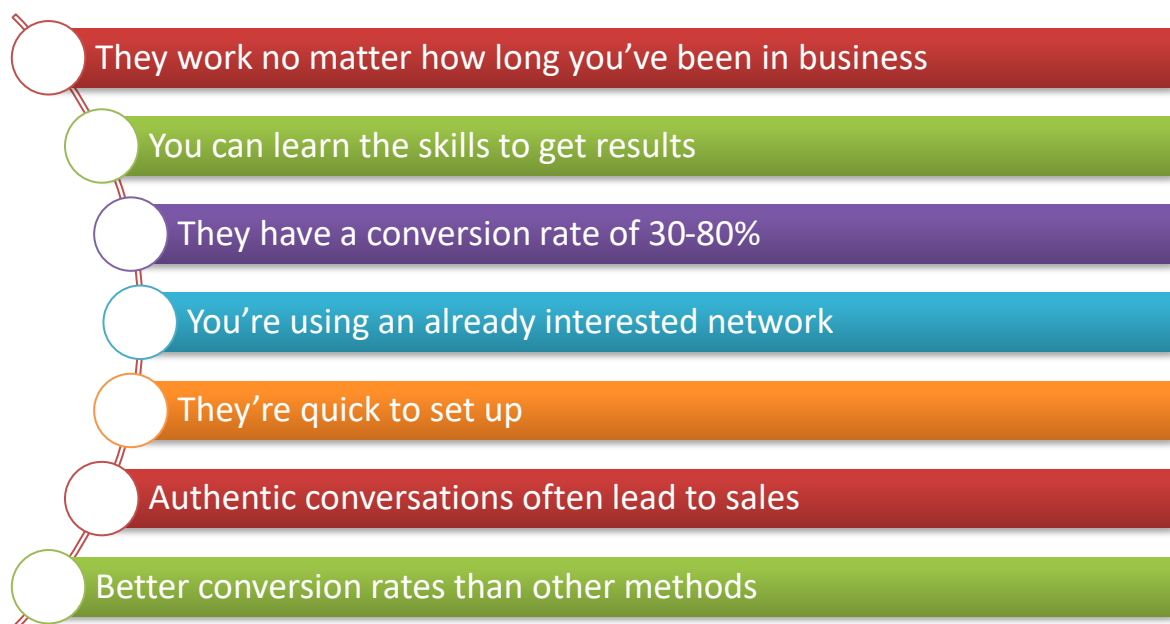
They are also useful for client research, as you have a conversation with the client about their needs, so even if they don’t buy it’s a win-win for you.

Conducting successful strategy sessions is probably the most useful business skill you’ll master and this will be with you for life. It will allow you to help others and get money in the bank. You can repeat it time and time again.

## **7 Great Reasons for Using Strategy Sessions:**

1. They work whether you’ve been in business for years or if you’re totally new.
2. You can learn the skills to get results.
3. They have a conversion rate of 30-80%. A 30% conversion rate means you only need to have 3 conversations to make one sale - not too onerous when you look at it that way.
4. You’re using a warm network that has already expressed an interest in your work.
5. They are quick, (and cheap) to set up.
6. When you follow the process, you’ll be having an authentic conversation with someone which often leads naturally to a sale.
7. In comparison, the conversion rates from webpage, ecommerce platforms, ads on Facebook, etc. are very low.

Which of these reasons would appeal to you most?



Before you start setting them up:

1. You need an offer. What are the problems that your potential clients would pay to solve?
2. You need to decide the price.

In addition, though not essential when you’re getting going, it makes sense to create an automated system to generate the calls on autopilot.

We’ll be looking at each of these aspects in later modules so you’re all set up to go when you make your first call.

## **Figure Out How Many Strategy Sessions You Need to Meet Your Targets**

Before we move on there’s another calculation to be done - last one, I promise ;-)

You need to work out how many calls you must make each month to hit your revenue goals.

1. Go back to Module 1 and get your conversion rate figure.
2. Go back to Module 2 and get your monthly revenue target.
3. Take the typical price you want to charge for a medium/high-end ticket offer and do a calculation based on these examples:

**Example:** I need to earn 4000 per month and I sell a program at 1000, therefore I need to sell 4 programs every month. If my conversion rate is 50% (or one in two) then I need to make a minimum of 8 strategy sessions per month.

**OR**

I need to earn 10,000 a month and I sell a program at 4000, therefore I need to sell 3 programs a month. My conversion rate is 30% (one in three) therefore I need to speak to a minimum of 9 people per month.

Get the idea?

The beauty of breaking it down like this is that you end up with a manageable and totally achievable figure. And this will boost your motivation to get on that phone.



## ***Key Takeaways:***

1. Strategy sessions are tried and tested and they work.
2. For the best results, focus on high potential prospects with whom you’ve been nurturing a relationship.
3. Own your expert status and do all you can to develop it.

## ***Brainstorming Activity:***

1. **Quick Win:** Figure out how many strategy sessions you need monthly.

<b><i>Conversion Rate %</i></b>	<b><i>Monthly Revenue Target</i></b>	<b><i>Typical Price</i></b>

**Example:** I need to earn 4000 per month and I sell a program at 1000, therefore I need to sell 4 programs every month. If my conversion rate is 50% (or one in two) then I need a minimum of 8 strategy sessions per month.

***OR***

I need to earn 10,000 a month and I sell a program at 4000, therefore I need to sell 3 programs a month. My conversion rate is 30% (one in three) therefore I need to speak to a minimum of 9 people per month.

<b><i>Monthly Strategy Sessions Needed:</i></b>	
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## ***Brainstorming Activity (cont):***

**2. Which of the 7 great reasons for using strategy sessions would appeal to you most? Why?**

- They work whether you’ve been in business for years or are totally new.
- You can learn the skills to get results.
- They have a conversion rate of 30-80%. A 30% conversion rate means you only have to have 3 conversations to make one sale - not too onerous when you look at it that way.
- You’re using a warm network that has already expressed an interest in your work.
- They are quick (and cheap) to set up.
- When you follow the process, you’ll be having an authentic, conversation with someone which often leads naturally to a sale.
- In comparison the conversion rates from webpage, ecommerce platforms, ads on Facebook, etc. are very low.

***Which One Appeals?***

***Why?***

## ***Brainstorming Activity (cont):***

3. **Your experience of strategy sessions exercise.** Reflect on this by answering the questions in the boxes below.

***What enticed you to sign up for a session?***

***What did you like about the session?***

***What didn't you like?***

***What was the deciding factor in your decision to purchase? If you didn't buy, what was the reason?***

***Will you go back to this person again if you have a future need? Why?***

## **Module 5 – Make Your Session Enticing**

In the last module we looked at how important the strategy session process is when making sales in a non-salesy way.

This makes it more even more crucial to offer a session which will be of value to the prospect regardless of whether they buy your program or not. And this is what we'll cover in this module.

### **Get Clear on What You Can Offer in Your Strategy Session**

Your prospects want to know that their time has been wisely invested.

But this isn't the place to over promise and under deliver. Be realistic in what you can achieve in a session which might only be 30 minutes.

Generally, you'll be offering a way to explore current reality and to brainstorm or mind-map a new idea.

For example:

- **Branding expert:** Review and refine a recent message, services, plans, or materials.
- **Speaking coach:** Role-play networking, public speaking, or self-promotion scenarios; create a resource list and action agenda for a new project.
- **I.T. consultant:** Give critiques or feedback on a website, social media, service or product packages.
- **Social media strategist:** Give critiques or feedback on social media presence, or Facebook ads settings.
- **Marketing expert:** Help re-evaluate who the dream client is.
- **Career consultant:** A strengths assessment and plan to develop and better use these natural strengths.



## Best Practices for Successful Strategy Sessions

### Name it

Create an enticing title for your session. Don't call it a 'free initial consultation'.

That's not a compelling title, and to many it says, *"I'm going to try to sell to you."*

Instead use a title which describes the benefits they get.

***For example:***

***"Better Leadership for a Better Bottom-Line Strategy Session"***

***"Double Your Profits in 90 Days Planning Session"***

Here are some examples to get you started brainstorming your own session's title:

- Rapid Change Coaching Session
- Business Breakthrough Blueprint
- Boost Your Business Brainstorm
- Sky-Rocket Your Sales Session
- Book Dream to Book Done Planner
- Modern Leadership Mastery

- Get Hired Now Planning Session
- Find Your Ideal Career Goal Setter
- Finally Thin Forever Discovery Session
- Lose Weight Action Plan
- Relationship Rescue Consultation
- Demons to Angels Coaching Session (Parenting)
- Insight Strategy Session

### **Explain it**

After you have come up with a compelling name for your sales conversation, you need to be able to describe the specific benefits potential clients will get from the session. This way they'll understand why it is worth investing their time with you.

Think about your clients' needs and prepare these outcomes carefully. Be sure you can meet the expectations you create.

Suggested examples of 'takeaways' you can promise:

- Crystal clear written goals
- A 'next step' action plan
- Greater personal awareness
- Insight into how you may be holding yourself back in this area
- Hidden challenges revealed
- Renewed energy for \_\_\_\_\_
- Extreme motivation to get the results you desire

### ***For example:***

In this 'Break Through Your Ceiling Session' I'll help you:

- Discover what is unconsciously sabotaging you from taking your business to the next level.

- Create a clear plan that describes in detail the steps you need to take to reach the next level in your business.
- Identify the one simple step you can take immediately to get into action.

Use this template for a script that will help you sell your own sales conversation.

In (your sales conversation name) you will:

- Get crystal clear on your vision for your \_\_\_\_\_.
- Identify any hidden obstacles that may be sabotaging your success in this area.
- Leave renewed and re-inspired with a clear action plan for success in the area of \_\_\_\_\_.

### **Time it**

How long do you want to spend on your conversations? Remember, this is an investment in your time but with a bit of practice you can convert one in three people.

You have to decide what’s appropriate. As a rule of thumb, this depends on what you’re offering at the end of the session. It makes no sense to spend 90 minutes if you’re only offering a \$197 product at the end. Neither can you expect to have enough time to lay out all the full value of a \$5000 program in 20 minutes.

You’ll find most sessions are 45-60 minutes long.

If you really only have a \$27 eBook to offer, then choose another way to make the sale because this isn’t it.

### **Restrict it**

Only offer these sessions to your highest potential prospects who have already built up a degree of trust and respect for your capabilities. If you’ve been nurturing the subscribers on your list, then these should be suitable candidates.

By making it clear that the offer isn't open to everyone, you invoke the marketing principle of scarcity and immediately make it more attractive. No-one likes missing out.

Of course, there *will* be a limit on how many of these sessions you can offer; this isn't just marketing hype. After all, you only have so many hours in the day.

We'll look at ways to qualify prospects in the next module and that way you won't waste time by people signing up for a free session in good faith, but who really aren't suitable or won't be able to afford your services.

### **Sell it**

Yes, even though it's free you still have to point out the value of this session. After all, the person will be giving up perhaps an hour of their time. And as we all know well, time is money.

Think of how you entice people to sign up for your lead magnet and you'll get the idea.

It makes sense to make the offer to people on your list who already know, like, and trust you. If you have some, make the offer to past clients too.

If you can promise time or money savings, then these are worth spelling out.

For example:

#### ***PR Consultant***

*“Give me one hour – and I'll uncover at least \$20,000 of free publicity opportunities in your business – or donate \$500 to a charity of your choice.”*

#### ***Virtual Assistant***

*“30 minute ‘Time Saver’ consultation will identify how you can save up to 10-15 hours a week in your business, starting today.”*



## ***Key Takeaways:***

1. You must be able to spell out the specific benefits potential clients will get from their strategy session so they know the time investment will be worthwhile.
2. Make sure the length of your strategy session is appropriate to deliver what you’ve promised and to make it an effective use of your time.

## ***Brainstorming Activity:***

1. **Quick Win:** Brainstorm your ideas to come up with 6 enticing titles for your session, taking into account your client’s needs and challenges.

1.

2.

3.

4.

5.

6.

*Now decide which title you’re going to use...*

## **Brainstorming Activity (cont):**

2. Write down 3 concrete outcomes you can promise from a 45-minute session.

Examples:

- Get crystal clear on your vision for your \_\_\_\_\_.
- Identify any obstacles that may be sabotaging your success.
- Leave renewed and re-inspired with a clear action plan for success.

**Concrete Outcome #1:**

**Concrete Outcome #2:**

**Concrete Outcome #3:**

3. Decide how long your session will be, who you'll target, and how. Write down your ideas in your action guide.

<b>Session Length:</b>	
<b>Target Prospects:</b>	
<b>How To Reach Them:</b>	
<b>Other:</b>	

## **Module 6 – Set Up Your Sign-Up Systems**

When you launch a process for strategy sessions, you want to make sure that *your* time is wisely invested too.

To ensure this, you need a system to educate, pre-screen, and qualify people so that those you speak to are able and ready to buy. This means putting up a little hurdle to ensure they are serious prospects, not ‘tire kickers’.

You’ll find out exactly how to do that in this module.

### **Pre-Screening for Results**

You need to get your prospects to pre-qualify themselves by giving you some vital information.

Here are 3 key ways that work:

1. Set up some questions in your appointment scheduler where the prospect describes their biggest challenge and what they’d like to get out of the session. You’ll be able to see their answers and assess whether you want to offer them an appointment or not.
2. Send an email with a series of questions about the free session. They have to answer the questions and reply to the email to be considered.

*For example:*

- Tell me about your business and your current income.
  - When it comes to growing your business, what is your biggest challenge?
  - On a scale of 1-10 (10 being highest), how important is it to you to get this solved... and why?
  - What is the # 1 obstacle that's kept you from solving this challenge in the past?
  - Where would you like your business to be in 6 months? 12 months?  
(Please specify revenue goals)
3. Devise a survey with [SurveyMonkey](#) or [wufoo.com](#) using some of the questions above.

## **Don't Feel Bad about Saying 'No.'**

The point of pre-screening is to weed out the people who aren't a fit for your offer just now, (maybe later on they will be). When you review the information they've provided, decide who you really want to invest your time with.

This will mean saying 'No' to some people, in the nicest way possible of course. But get used to doing it. It's better for both of you not to waste time.

This will get easier the more you do it.

## **Limit Your Availability in Your Scheduler.**

You don't want to show people a wide-open schedule.

You can always add additional availability as things fill up. Also, it's a great idea to schedule your sessions an hour apart, and bunched together. This way you'll be 'in the zone' as you're doing your block of sessions.

## **Get Automated**

If this is going to be your main method of making sales of medium and high ticket offers, then you'll want to automate the sign-up process as much as possible.

Of course, when you start out with sales conversations you don't really *need* to do this. It can be very straightforward. You contact a warm lead and you know they interested and you make an appointment in your diary.

'Begin with the end in mind' and set up systems now that will save you time later.

Use these systems for clients who have already opted in to a list. That way you know they are interested in what you do and are more likely to want to go further.

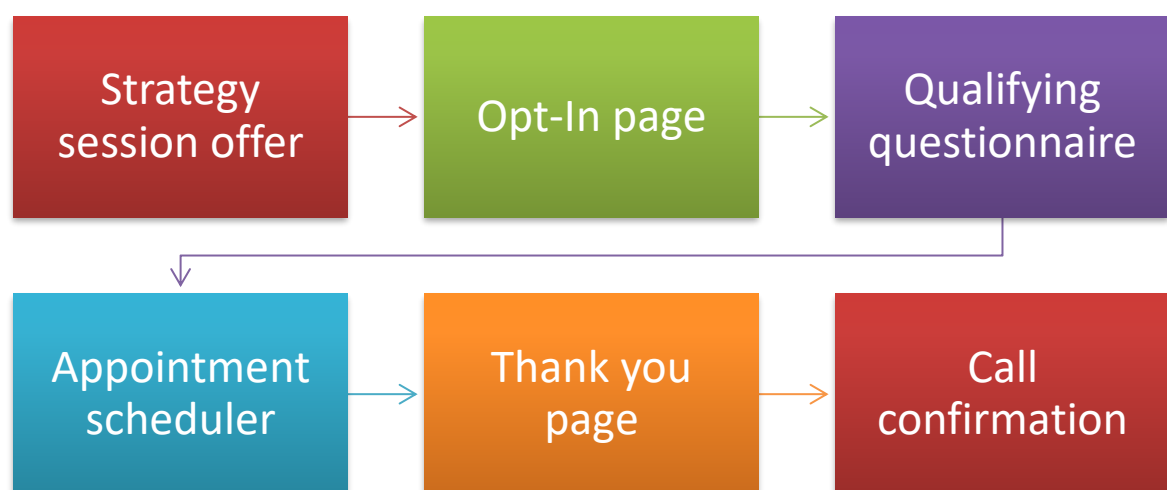
The basic you'll want are:

- Skype or Zoom (or a similar tool) for your calls
- An appointment booking service like [SimplyBook](#) or [Timify](#) which can make appointments for you, (ensure you can preset questions to qualify prospects).

But with a few more systems in place, you can make the process seamless. And you want to appear seamless for your client too.

This is the flow that they will be taken through:

1. Make an offer of a strategy session by email which sends them to an opt-in page ‘selling’ the strategy session
2. They are then sent to a qualifying questionnaire (or a scheduler which has qualifying questions)
3. They then schedule an appointment
4. They are finally sent to a ‘Thank You’ page which explains that the next step will be a confirmation from you of the call.
5. As soon as you can, look at the opt-ins and make your decision on the suitability of each person. Then confirm ‘Yes’ or ‘No, not this time’ with them.



That perhaps sounds a lot of tech. But if you follow this step-by-step guide then it will be straightforward:

1. Create your session offer page using leadpages.net or similar (see the template below for help with this)
2. Link this to a questionnaire with Wufoo or SurveyMonkey *or* to your scheduler to ask qualifying questions and make an appointment.
3. Create a ‘Thank you’ page which describes what will happen next - for example, when they’ll hear if their appointment has been confirmed.

## Create Your Session Offer Page

Your copy needs to sell your session and will probably be more comprehensive in terms of copy than your lead magnet landing page.

This is easy to set up using LeadPages or other landing page platforms, as there are proven templates you can customize.

Here's a template which you can adapt to get you started:

*Since I sent out the {name of your lead magnet} a couple of weeks ago, I've discovered that even though it gives all the information needed to do XXX, a lot of people I talk to are still struggling with the things that are stopping them.*

*They know that being a XXX is the most effective way to XXX.*

*But, even though the solution to taking action is actually right at their fingertips, they just don't see it. Maybe you can relate to this, too.*

*Which got me thinking, what could I create that would get you started quickly, with exactly what you need to solve this problem?*

*Well, today, I came up with the perfect solution. I'm opening up just 10 spots to coach with me next week -- at no cost, my treat -- for 60 minutes.*

*It's my XX-minute XXX Session.*

*The thing is, with only 10 spots open, these are going to be snapped up fast. And to be considered you'll need to apply right away.*

*In this XXX Session I'll help you:*

- *Get clarity on all the benefits XXX will bring you*
- *Discover what is unconsciously sabotaging you from taking this important step*
- *Identify the one simple action you can take immediately to get moving towards your goal*

***Here's how it works:***

*If this interests you, and you'd like my help, click on this link to apply for your session. You'll need to answer a few key questions for me so I can see if I can really help you. Then I'll confirm the details of our call which will be by Skype.*

*If you're ready to stop playing small and REALLY achieve the breakthrough that the XXX will bring you, then I urge you to apply for one of these 10 limited spots with me right now, before your chance disappears.*

## **Getting Paid**

The last system that you need in place is a way people can pay you on the call when they sign up for your program.

You don't want to get to the point that they say 'Yes, I can't wait to get started' and then fumble about asking them to send you a check.

You need to make paying as easy as possible for the client. This will usually mean paying by credit card.

PayPal is the simplest to start with, as people can pay by credit card if they don't have a PayPal account. If you envisage taking large amounts of money, then you might need a merchant account with PayPal or with a bank. Remember to compare charges. With developments in mobile technology, there are new services coming on line all the time. People can pay from their smartphones, such as Apple Pay or Venmo in US, or gocardless.com in the UK.

Find a system that will operate for all currencies too if you can, (not just USD). That way you make it easy for people all over the world to pay you. But you'll need to investigate the options available in your country.

## ***Key Takeaways:***

1. You need a qualifying process to weed out the “tire kickers” and those not yet ready for your offer or you’ll waste both your time and theirs
2. Get your payment processes set up so it’s easy for clients to pay you.

## ***Brainstorming Activity:***

1. **Quick Win:** investigate the best way for you to take payments & set one up.

Payment Processor	Notes
PayPal	
Apple Pay	
Venmo	
Stripe	
Other	



## ***Brainstorming Activity (cont):***

2. **Create the copy for your session offer page** based on the template provided earlier in this module.

3. **Set up your systems and test them over and over.**

## **Module 7 – Clarify Your Offer & Design Your Package**

Until you’re totally clear on your offer and its value to your clients, you can’t price it and you can’t offer it to anyone.

In this module, you’ll spell out your offer and design and price the package that will help your most engaged prospects.

### **Creating Your Client’s Ideal Solution**

Are you frustrated because you’ve been promoting your offerings relentlessly and it seems that people just aren’t interested?

Remember when we talked in an earlier module about knowing your client? This is where that really pays off.

Take a moment to climb inside the conversation that’s already going on in your prospects’ minds.

You want to ask yourself:

What are they saying to themselves when they wake up?

What are they worried about on the way to work?

What problems do they have on their mind?

What are the challenges they need to fix?

- What are they saying to themselves when they wake up in the morning?
- What are they worried about or preoccupied with on their way to work?
- What problems do they have on their mind that they need to sort out?
- What are the issues or challenges that they need to fix?

If you can't answer these questions, then you probably need to do a bit more research. Take time out of the course to talk to a past or current client (or several) and put these questions to them to get the data you need.

When you've figured out what their issues are, you can align what you're offering to them. Show that your product or service is the solution to those issues or a way to achieve their goals. You'll be onto a winner.

## **Provide a Package of Solutions**

Your clients need your services on a regular and consistent basis to bring about continued and lasting results. They won't get the full benefits of all you have to offer if they just work with you once or twice.

Therefore it's in their best interest for you to create longer-term packages.

For example:

- A nutritionist would serve their clients better by offering a package of 12 appointments over a 6-month period.
- A results-focused business coach would serve their clients better if they offered an intensive 90-day program which promises results.

Longer packages are a win-win for clients and also for you because:

1. You will get better results for your clients when they commit to working with you on a regular basis. They will get lasting results, be a great testimonial, and probably refer *other* clients.
2. It makes payment and scheduling easy. Your average value per client will increase as soon as you replace one-off sessions with packages.
3. You will be able to forecast your revenues for the year in a way you have never been able to before.

## Design Your Package

To help you design your package, ask yourself these questions:

1. How can I package what I offer into a program that gets better results and keeps clients staying with me for more than just one session at a time?
2. What quantity or frequency level would give my clients the most beneficial end-result?
3. What longer term packages can I offer using either time periods (eg. 6 months) or bundled sessions (eg. package of 12)?

Be very specific about features of your package. For example:

- Don't say “unlimited email access during the program” because you might get someone who emails you twice a day, every day. Can you handle that? Do you want to? Say instead, “we'll stay in touch once a week by email.”
- Don't say “emergency coaching session when you need them” but, “if you have an urgent issue you need help with then, I've built in three 20-minute emergency coaching sessions during the program. Email me when you need this and we'll set up a time.”

When you're clear, write down a description of the package you will offer and what's included, separating out benefits and features.

## Emphasize Value

We've said it before: You must be clear on the value a client will receive before they can understand it and buy in. To remind you, look again at the Value Inventory you completed in module 3.

Ask yourself these questions:

Who is your biggest success story?



What results did they achieve?



What was the specific problem you solved for them?



1. Who is your biggest success story to date?
2. What results did they achieve as a result of being your client?
3. What was the *specific* problem you solved for them? What process or system did you provide that enabled them to solve that problem?

## Difference Between Benefits and Features

**Benefits** = things like accountability, more free time, less overwhelm, improved relationships, increased profits

**Features** = e.g. 3 one-hour coaching sessions once a month

When speaking with your prospects, always talk about value first and emphasize benefits rather than features.

Follow the process in the next module so you don't talk about pricing too soon.

## Pricing

Most people think that clients buy on price, but this isn't necessarily true. There are other things that factor into this decision, such as:



- Confidence in you and your products
- Quality of your product or service
- Level of service
- Range of offers and options

## **Decide on Your Price**

Go back to revenue goals. Think about the value you offer. The transformation you promise. What’s it worth to them?

Remember, you’re not selling your service. You’re selling the results. Nobody is interested in coaching or consulting. They are interested in results. They are looking for solutions to their problems.

Don’t worry about charging too much. Over-pricing is not something that’s common among entrepreneurs – it’s usually the opposite.

## **Be Confident About Announcing Your Price**

When you’re excited about what you do and the results that you are able to provide for people, you can easily sell without having to be a salesperson.

Don’t get me wrong - at some point you *do* have to ask for their business, but that will emerge as a natural part of the conversation when you’re asking questions and showing genuine interest in your prospects.

Most of us get a little nervous when discussing our fees

## **Practice Makes Perfect**

Here’s an important tip: role play that part of the conversation when you announce the price until you feel comfortable.

- The best athletes in the world have coaches, and they practice and train every day. Why should sales be different?
- Without practicing and rehearsing, you’re not improving or preparing in the right way.

- Try repeating your fees to yourself until it becomes second nature. Say it out loud, to the mirror, while you’re in the shower, while you’re driving, whenever. Just keep saying it until you take yourself seriously. It should sound as natural as “can you pass the salt”.

### ***Key Takeaways:***

1. Be confident when you announce what you charge. People will pick up instantly if you’re nervous & wonder why you’re hesitant about your pricing.
2. Always emphasize benefits rather than features.
3. You are doing your clients a disservice if you don’t offer packages to help them work with you over a longer period of time.

### ***Brainstorming Activity:***

1. **Quick Win:** How well do you know your client? Answer these questions...

*What are they saying to themselves when they wake up in the morning?*

*What are they worried about or preoccupied with on their way to work?*

*What problems do they have on their mind that they need to sort out?*

*What are the issues or challenges that they need to fix?*

## ***Brainstorming Activity (cont):***

**2. Revise your Value Inventory and answer the questions below.**

*Who is your biggest success story to date?*

*What results did they achieve as a result of being your client?*

*What was the **specific** problem you solved for them? What process or system did you provide that enabled them to solve that problem?*



## **Module 8 – Run a Strategy Session** **that Converts**

You probably started this course feeling very uncomfortable about selling. Hopefully by now, you’re seeing it in a different light.

And at last, after all the important lead up to this stage, now you can get to grips with the skills and step-by-step process needed to conduct successful strategy sessions.

You’ll find it was worth the wait.

### **Basic Skills to Sell Without Selling**

If you use these three basic skills, you’ll uncover business opportunities you didn’t know existed and make more sales as a result.

1. **Ask questions and listen** – the more you listen, the more you sell. Stop thinking about what you want to say and give your attention to your client and what they say about their desired situation.
2. **Summarize as you go along**. And check out with them that you’re on the right track. You can use some of the following phrases:

*So what you’re telling me is.... Is that correct?*

*What I’ve heard is that ..... Have I got that right?*

This is a very powerful tactic. It shows to the person on the other end of the call that they’ve been truly heard. It can also help them clarify their thinking and move on.

3. **Make an invitation to the next step**. Summarize:

*So what do you think is the next step?*

*Where should we go from here?*

*From what you’re telling me, I have something coming up which I think will really help – shall I tell you about it?*

## [How to Design Your Own Introductory “Useful but Incomplete” Strategy Sessions](#)

You see, you can have a natural, authentic sales conversation that matches your personal style and have more clients saying “yes” more often and more easily.

Compare these three skills to your current performance in conversations when you make an offer:

1. **Listening.** What percentage of time do you spend listening?
2. **Summarizing.** Do you summarize before moving on? How might you do it?
3. **Next Step.** How do you introduce the next step?

We’ll go into the whole process in detail a bit later in the module and give you some ‘magic’ questions to reveal your clients’ true desires and fears; then you can match your offer to their needs.

Before we do that, let’s highlight a few key do’s and don’ts about strategy sessions:

### **DO**

- Get them to the outcomes you promised when they signed up for the conversation.
- Always add value to the strategy session by providing some recommendations or simple ways to help.
- Make an offer but only *if* you feel they are a fit.
- If they say ‘Yes’, take some payment if possible as this will reinforce their commitment. If they want to start but they can’t pay the whole amount at that moment, ask them to pay a deposit.
- Record the call for your own learning purposes.

### **DON’T**

- Coach them out of their problem completely on the call. If you do, then they will feel they don’t need your services. In fact, they probably still *do*; you’ve just helped them get some immediate clarity. They’ll go away, recognize they still have issues, and then sign up with someone else.

- Give away the farm. You want to come across as approachable and knowledgeable, but you don’t have to solve their problem for them (even if the answer is staring you in the face). That’s not helpful to them and it won’t lead to long term results.
- Make your offer just for the sake of it if they aren’t a fit. Ideally, a strategy session will either clearly surface a sales opportunity or definitively disqualify a prospect. You should come out of your calls with an understanding of your prospect’s needs and how you can help solve them, and your current offer may not be the way do that.

## The 7-Step Process for a Winning Sales Conversation

Follow this process to get the results you want. Don’t be tempted to switch around the order of the steps, as they’ve been designed to work this way.



### Step 1. Explain What Will Happen

Tell them exactly how the conversation will work. For example:

*“I am going to tell you a little bit about myself, so you know who you are talking to and then I am going to ask you a few questions about you, and your business, and*

*then if I feel like I could help you further, I will let you know how we can do that. Is that OK?”*

This only takes a few minutes but it’s very important, as it not only sets the scene, but ensures you take control of the conversation from the get-go. It also means they have given their permission for you to make your offer later on in the call, if it’s appropriate.

Reassure them at the outset that everything they say is completely confidential.

## **Step 2. Establish Yourself**

Tell them a little about yourself so that they know that you’re experienced at doing what you do (this should only be 3 or 4 minutes at most - don’t get carried away).

## **Step 3. Question Their Future Vision and Current Situation**

You may already have the answers to these questions in advance if they have filled in a questionnaire, in which case get them to expand on some of their answers or clarify them. **It is through this questioning that you determine whether or not you can help them and if they need the solution you provide.**

The questions will vary depending on your business but the first question you should always ask is:

***“What made you decide to invest the time today to have this conversation?”***

This is crucial, as it demonstrates that they are already investing in themselves by making the time for the call.

### ***Dig deep***

Here’s a list of those ‘**magic**’ questions we mentioned earlier.

1. Start asking about their dreams and aspirations:

*“Tell me about the vision you have for what you want your {business} to look like in a year, if things were to go really well?”*

*“What inspired you to ... set up your business/become self-employed/ work for ...?”*

*“If we could wave a magic wand, what would your business/life look like in 6/12 months’ time?”*

*“Why do you want to ... get fitter/lose weight/make more money?”*

*“What do you feel is holding you back?”*

2. Then, explore their current reality

*“What are your three biggest challenges currently?”*

*“How would you rate your satisfaction in this area from 1---10 (1 being the lowest and 10 being the highest)?”*

*“What is your current turnover/annual income?”*

*“What would you like it to be in 12 months’ time/next year?”*

*“What would it mean to you if you achieved that turnover?”*

*“What would that allow you to do that you can’t do now?”*

The purpose of these questions is to identify the gap between where they are now and where they want to be. You start with their future goals and work back to the present. In that way you engage their emotions about their dreams *first*. This acknowledges their motivation for change and underlines the importance of aspiring for something better.

#### **Step 4. Find Out the Cost of Them Staying Where They Are**

With these questions you highlight the seriousness of their current situation and its effects on their life. For example:

- *“What is it really like not earning enough money/not spending enough time with your children/being overweight/not being who you are meant to be?”*

- *“How much time do you spend working on this area without getting the results you want?”*

### **Step 5. Examine Options**

Get them to see the possibilities that are there for them with the right support.

For example:

- *“If you could get 3 more clients a week what would that mean?”*
- *“If you had the right support and lost 10 pounds how would that impact your life?”*

### **Step 6. Present Your Offer**

Just before you present your offer:

- Review their big issues and the impact of those issues currently have on them and their business/life
- Remind them how valuable it would be to them to get a solution

In this way, you tie in what they’ve told you to the solution you propose. This will make it much more likely they’ll hire you as a result.

When you present your offer, focus on the value and emphasize the benefits.

Explain how you'd work together and be clear on what they would need to do to see the results they want.

*“From what you’ve told me it sounds like I have something that will help you reach those goals you told me about...”*

### **Step 7. Ask for The Business**

Take a deep breath and be bold, using a question like:

*“When would you be ready to get going?”*

*“What date shall we fix for our first appointment?”*

*“I’m really excited to be working with you. When shall we start?”*

When they say “Yes,” confirm they’ve made the right decision and take payment.

Then, agree on next steps.

We'll look at dealing with common concerns in the next module, but here are a few practical ways to counter “*I don't have the money*”:

- Offer a ‘fast-action bonus’ which is a discount only available to people who commit to taking action on the call (this can double your conversions).
- If they want to do it but only the money is stopping them, offer payment plans or get them to write a list of all the ways they could raise the money
- Remind them they can do it anytime, but they only qualify for the fast-action bonus on this call (therefore make the discount worthwhile; for example, 6000 down to 5000 or 997 down to 697).
- If they want to do it but need to raise finance, schedule another time with them preferably later that day to take the money.

Whatever their decision, thank them genuinely and hang up.

### ***Key Takeaways:***

1. Use the strategy session process to establish their ideal vision *before* you probe their current reality. This defines the gap that your offer will bridge.
2. The strategy session is a genuine conversation where you uncover their need for your solution.
3. If you leave the prospect with a positive impression, they are more likely to reach out when they become sales-ready (if they aren't currently).

## **Brainstorming Activity:**

1. **Quick Win:** Compare these three skills to your current performance in conversations when you make an offer:

<b>Listening.</b> What % of time do you spend listening?	
<b>Summarizing</b> Do you summarize before moving on? How do you do it?	
<b>Next step.</b> How do you introduce your next step?	

2. **Review the 7-step process.** Decide what you will say at each step.

### **Step 1. Explain What Will Happen**

***For example:** “I am going to tell you a little bit about myself, so you know who you are talking to and then I am going to ask you a few questions about you, and your business, and then if I feel like I could help you further, I will let you know how we can do that. Is that OK?”*

### **Step 2. Establish Yourself**

***For example:** “I’ve been working in this industry for X years now, and I see myself as being an expert in the fields of X and X”*



## **Brainstorming Activity (cont):**

2. **Review the 7-step process.** Decide what you will say at each step (cont).

### **Step 3. Question Their Future Vision and Current Situation**

*For example: What made you decide to invest the time today to have this conversation?”*

### **Step 4. Find Out the Cost of Them Staying Where They Are**

*For example: “What is it really like not earning enough money/not spending enough time with your children/being overweight/not being who you are meant to be?”*

### **Step 5. Examine Options**

*For example: “If you could get 3 more clients a week what would that mean?”*

### **Step 6. Present Your Offer**

*For example: “From what you’ve told me it sounds like I have something that will help you reach those goals you told me about...”*

### **Step 7. Ask for the Business**

*For example: I’m really excited to be working with you. When shall we start?”*

## **Module 9 – Confidently Address** **Common Concerns**

When you use the strategy session process, some people will say ‘Yes’ right away and won’t need any further convincing.

But there will be some people who have genuine concerns that need addressing. And there will be some who use an excuse to avoid saying ‘No’ to you.

In this module, you’ll get practical help to handle these situations.

### **The 3 Most Common Concerns**



#### **#1 “I can’t afford it”**

Remember, people often use money as an excuse when they don’t want to do something. It will be the objection you come up against the most.

Here are some things you can say to counteract this:

- *“If you were earning X would you do it?”*
- *“If you had the money sitting in your bank account would you do it?”*
- *“I remember you said how hard it was not earning enough money/not spending enough time with your children/being overweight/not being who you are meant to be. I’m confident that this program will solve those issues for you. So what really makes you hesitate?”*
- *“You told me at the start that you are dissatisfied with XXX. How much longer are you prepared to put up with it ....?”*

## **TIPS**

- If they need time to raise the finances, always schedule a time to speak with them again at some point in the very near future.
- Don't be tempted to discount your fees. When you allow people to push you into lowering your fees, you are filling your business up with clients that you will soon resent. This is unhealthy and completely avoidable.

### **Offer Another Solution for Your Clients' Problems**

When it's *really* a matter of affordability, you can help by offering an alternative solution. For example, if they aren't ready to invest in your private coaching, then they can sign up for your newsletter and join your Facebook group.

Having multiple packages to offer your prospects makes the entire sales process much easier. Regardless of their objections, you have somewhere to put them.

### **Don't Prejudge a Person's Ability to Pay**

Some people will be prepared to make all sorts of sacrifices to get the results you're offering. Make your offer as usual and only offer budget alternatives once they have convinced you that they *genuinely* have a problem with finance.

## **#2 “I want to think about it/I can't decide right now.”**

Some people's automatic response when asked for a decision is “I have to think about it.” Help them work this through with questions like:

- “What info can I give you to help you make a decision?”
- “What is it that you need to think about?”
- “Perhaps it's my fault and I haven't explained the benefits clearly enough. What information is missing for you?”
- “When would you be ready to make a decision?”

### **#3 “I have to speak to my partner.”**

This is a tricky one, as sometimes people’s finances *are* joined up, but it can also be an excuse.

- Emphasize that the benefits are for them and not their partner.
- Take a deposit, as that shows they’re serious about wanting to work with you and this isn’t just an excuse. Most anyone can do \$100 on the spot and if they can’t then they probably aren’t the client for you anyway.
- Make sure you arrange a specific time to speak again soon when you ask for their decision.

### **Get Them to Say ‘No’**

Of course, what you really want is ‘Yes’ but believe it or not, the second-best answer is ‘No.’

It might not be pleasant to hear this until you are more practiced. So help yourself to take the sting out of the word

Answer these questions to begin to desensitize the impact of the word ‘No’ on you:

- How do you feel when someone says ‘No’?
- What is your reaction to rejection?

### **The response you don’t want is, “I’ll think about it and let you know.”**

It might be their polite way of saying ‘No thanks.’ What this will mean to you is that you’ll end up chasing them for an answer and wasting a huge amount of time. And they’ll probably end up saying ‘No’ in the end.

If their indecision seems genuine, then make an appointment to speak again later that day, or the next day. You can explain that numbers are limited and the longer they wait, the higher the chances are they’ll miss out.

Once you get the ‘No’ you can let that call go and move on.

Don’t focus on the rejection – it’s not a rejection of you. But use it as a learning experience whilst you’re getting familiar with the process.

Don’t forget even the biggest influencers don’t close the sale every time. This isn’t a battle of wills. You don’t have to force them to say ‘Yes’ – in fact, you shouldn’t.

When somebody sees that you’re willing to walk away and move on they suddenly see more value in you. You aren’t somebody who is begging for their business.

It can be very scary, but take a deep breath and say, “It’s been a pleasure talking with you.” Then say to yourself, “Next.”

## **Handling Buyer’s Remorse**

Once they get off the phone with you, they will weaken. Not because the offer is no good but because it’s probably a stretch for them – financially, time wise, emotionally. This is a great thing as it shows that they will really benefit from your offer. They’ll get the results they want *because* it’s a stretch.

*You* can see the potential for the prospect even when they can’t see it for themselves. Their family and friends will only see the price tag or the time their loved one needs to find – they won’t see the result that you can imagine and you can get the prospect to see during your conversation.

Even when they’ve said they’re committed and maybe even paid a deposit, they may come back and say they’ve changed their mind. You’ve probably done this yourself at some point yourself, so be understanding.

### **What do you do?**

Buyer’s remorse usually presents itself within the first few days after a purchase. That means it needs to be addressed sooner rather than later.

Here are a few things you can do to reduce the factors related to buyer’s remorse.

## [How to Design Your Own Introductory “Useful but Incomplete” Strategy Sessions](#)

1. Make sure you have created a solid foundation in your strategy session and shown the value of your offer.
2. Set expectations. Get your onboarding process to kick off straight after someone signs. That way they'll feel more committed. (We'll look at onboarding in detail in a later module)
3. Have systems in place to deal with refunds should they occur.
4. Adjust your mindset. Remember there are other clients out there who need you. Don't spend too much time or agonize over one who is basically scared of achieving their potential. They may come back one day when they're ready.



If you really feel that after encouragement they aren't going to play ball, then you probably don't want them as a client anyway. If they are *this* reluctant at the get-go, how will they be in week 12 of the program?

### **Always ask for the business**

It doesn't matter which concerns you've been handling. Make sure that once you've answered all the questions that you remember to make the offer again.

## ***Key Takeaways:***

1. The conversation is not a battle of wills to get them to say ‘Yes.’ Be prepared to walk away.
2. People often use money as an excuse when they don’t want to do something. Probe this response to find out more.

## ***Brainstorming Activity:***

1. **Quick Win:** How do you feel when someone says ‘No’? What is your reaction to rejection? Quickly write down everything you can think of. This way you can begin to desensitize the impact of the word ‘No’ on you.

## ***Brainstorming Activity (cont):***

2. Write yourself 3 responses that deal with each of the 3 common concerns.

***“I can’t afford it.”***

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***“I want to think about it.”***

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***“I need to speak to my partner.”***

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## **Module 10 – After the Sale: Set Up for Success from Day 1**

Your clients have more choices for products and services than ever before. And with the proliferation of digital communications, it’s easier for your competition to reach your prospective clients — and harder for you to stand out. To be successful, winning a new client isn’t enough. You must provide an unparalleled experience that demonstrates your commitment to their success with your product or service.

In this module, we’ll look at a process for onboarding clients so that they’ll have all they need to start benefiting from your help as soon as they sign up.

### **What is Onboarding?**

Onboarding is the process of familiarizing a new client with your product and your way of doing things. It will recap on the benefits of your package and help them get the best out of it.

### **What if I Don’t Onboard?**

If you don’t properly onboard new clients, the consequences can ripple through the life of the program and beyond.



- They won't feel welcome
- They won't know what's expected
- They won't get a good impression of you or your company
- They won't get the results they signed up for
- They won't give you a good testimonial

Let's look at the contents of the type of onboarding you want to provide to avoid all of these.

## **Design Your Onboarding Information**

The data you provide will obviously depend on the package you're offering.

Whatever that is, the onboarding information (or at least the first parts of it) needs to be set up before you start selling. Then, you'll be ready to go the moment someone says 'Yes.'

### **First steps**

Immediately after the sale is complete, explain to your new client what they can expect to receive from you and your company. Explain what the first step in the program is (we'll look at this separately below).

### **Send your business pack**

This can be a simple letter listing the next steps in the process, how your relationship will be handled, how invoicing will work, and so on. Or, you might want to get together a pack of documents on different topics. You don't want to overwhelm them. Be sensitive to this and don't send files full of information.

Whatever you decide, the pack needs to contain the following:

- About you and your company and how they can contact you
- Meet the team (if they will be in contact with them) including photo introductions and contact details
- How to join the Facebook group or your online community (if you have one as part of your offer)
- What you can expect from us/what we expect from you

## **Contracts**

A signed program agreement sorted upfront can save a lot of potential pain and heartache down the line.

Here are the kind of things to cover in a program agreement:

- Explicit agreement to the terms of the Agreement
- Behavior and conduct expectations
- What happens if we miss scheduled sessions/your cancellation policy
- Responsibility for payment
- What intellectual property belongs to whom

**Tip:** Be sure to have someone with legal expertise look over your program agreement to make sure you’re covered.

**Pro Tip:** Use a tool like Adobe Sign (formerly EchoSign) or DocuSign to send, digitally sign, and track these kinds of documents.

## **Communicate expectations and boundaries**

In Module 7, you looked at the specifics of your offer and you’ve probably refined these since.

Communicate these specifics in writing to save a world of pain later on:

- Exactly what your new client will get from you
- Exactly how you expect them to engage and commit
- How often you’ll be in contact
- Turnaround times
- Your regular work hours
- What happens if they want to contact you after hours
- The best way to stay in touch
- How to submit homework
- Email support

## **Get paid**

Remember the deal isn't done until there's money in your account.

If people only paid a portion or deposit on signing up, make sure you have a system to collect the balance. If you've offered easy pay instalments, then set up a system of recurring payments and make sure the client is aware of how many payments, payment dates, and payment method.

Getting the money in is simple business practice and you don't have to apologize for it. If you've ever been let down by someone who promised to pay but didn't, you'll know how disappointing this is and how frustrating it is to be chasing money.

## **Give them something to do**

It's important for clients to feel engaged as soon as they sign up. At this time, they're feeling excited and extra motivated. Take advantage of this. This is especially important if there are group elements to your package and there is some time delay between signing-up and attending the first group session.

The activity could be:

- Arrange your first one-to-one session
- Join the Facebook group and post information about yourself
- Do an exercise related to the topic of the package
- Complete a New Client or Intake Questionnaire with questions directly relevant to your area of expertise and the problem you'll be helping your client solve. Some of the questions could include:
  - What have been your 3 biggest accomplishments in the last year?
  - Where would you like to take your business in the next 6 months?
  - What is the biggest challenge you're facing in your business right now?
  - How many clients are you working with this month?

## Send a welcome gift

You can make a huge impact if you send your new client a small, thoughtful, personalized gift. It will make you stand out from the competition. It doesn't have to be expensive. It can be as simple and affordable as a handwritten card sharing your excitement about the opportunity to help them achieve success. Factor in the cost of the gift and its delivery in your package price.

Other welcome gift ideas:

- Flowers
- Notebook
- Yoga mat
- Journal
- Book
- Food hamper
- Special crystal/gem

**Tip:** The sooner your new client receives your welcome gift after making the decision to work together, the more impactful it will be. Think through what you could do to streamline this process. For example, you could keep some blank cards ready or your local florist's contact details on hand or you could use a fulfilment house to send out the gift for you.

## Getting Organized Recap



- Send out the first activity
- Forward book all appointments
- Create a folder and email filter in your inbox
- Submit invoice(s) and receive payment

## ***Key Takeaways:***

1. Having a written contract or agreement where you set out your way of working will save you potential hassle later on
2. Make sure that you give the new client something to do right away, as soon as they have signed up. This takes advantage of their new-purchase energy and keeps them engaged and motivated.

## ***Brainstorming Activity:***

1. **Quick Win:** Design the initial activity that you’ll give them to do right away.

### ***For example:***

- Arrange your first one-to-one session
- Join the Facebook group and post information about yourself
- Do an exercise related to the topic of the package
- Complete a New Client or Intake Questionnaire

*Initial Activity:*

## ***Brainstorming Activity (cont):***

### **2. Complete the Onboarding Checklist in the Action Guide.**

<b>Task</b>	<b>Complete?</b>
Explain what your client can expect to receive	
Explain the first step in the program	
Send out your business pack <ul style="list-style-type: none"><li>➤ About you</li><li>➤ Meet the team</li><li>➤ How to join online communities</li><li>➤ What they can expect/What you expect</li></ul>	
Send out contract/program agreement <ul style="list-style-type: none"><li>➤ Explicit agreement to terms</li><li>➤ Behavior/conduct expectations</li><li>➤ Cancellation policy</li><li>➤ Payment responsibility</li><li>➤ Intellectual property terms</li></ul>	
Have someone with legal expertise look over agreement	
Use signing tool for electronic signature	
Communicate any other specifics	
Receive payment/set up installment system	
Arrange initial exercise	
Send welcome gift	

### **3. Create contracts/agreements & get them approved by your legal advisor.**

## **Module 11 – Keeping Momentum Going**

Now you’ve practiced the skills of the sales call and are on your way to mastering them. You’ve also put a system in place for people to sign up on autopilot. But you’re not quite done yet.

You now need to focus on getting people on calls in order to refine your skills and make more sales.

In this module, you’ll discover practical ways for keeping your momentum going.

### **Get the Results You Desire**

Your business will definitely grow if you take advantage of this important tool to turn your prospects into paying clients.

Choose to make strategy sessions a key part of your business growth, and you’re seizing the opportunity to market directly to your potential clients. This is a surefire way to grow your business.

And whenever you need a boost in income, then you can launch a campaign to get new prospects to sign up for sessions. It’s a bit like having your own ATM at home.

### **Prioritize**

As with all aspects of business, you have to decide where it makes sense to invest your time and energy.

You have a multitude of other things to do. It’s all about prioritizing. In this case, making sales calls is your number 1 priority.

Even some of the multimillionaire entrepreneurs do their own strategy sessions. They agree that the connection needs to be there from the beginning as they’ll be working with the client down the line.

If it works for others, it will work for you too.



## Different Ways to Lead Up to Strategy Sessions

When you decide to focus on strategy sessions as a way of making sales, there are a variety of ways to get people to book.

It makes sense to present the offer to people on your list who already know, like and trust you.

But here are some other ways to attract prospects:

- If you have past clients, email them.

*This type of approach works: “I’m reaching out because it’s been a while since we connected and I’d love to find out more about how things are going for you right now – and see if there is anything going on at the moment that I could help you with....”*

- Set up a content-rich free webinar and offer the strategy session as your call to action at the end
- Get referrals by sending individual emails to people you know
- Customers are 4 times more likely to buy when referred by a friend [Nielsen]
- Make a list of 10 people you know & send them an email based on this template:

***“I’m a wellness coach and I’m looking to set up special breakthrough sessions with people who have a certain result they want to get in the area of wellness. As a result of this session they’re going to get motivated and inspired about what it is that they want to achieve, get really clear on their goals, uncover any obstacles that are holding them back and plan their next steps. Who do you know who’d be interested in this?”***

- Send people to your opt-in page from posts, blogs, Twitter, and other social media platforms
- Set up ads in Facebook

If you broadcast the offer to your wider network through social media, then you *definitely* need to have a way to qualify the approaches. It’s unlikely that these people will know you or your work well and you need more information before you agree to speak to them. Go back to Module 6 to check out ideas for pre-screening.

## **Practice, Practice, Practice**

There’s no doubt that “practice makes perfect”. The more you do strategy sessions, the more you’ll develop your skills. You’ll make your script your own and what started out as (probably) a bit forced, will become your natural, authentic style of talking with prospects.

You’ll be making sales and helping more and more people. And you’ll end up enjoying the strategy sessions more. In fact, you *may* even enjoy selling in the end.

## **Plan Out Sales Days in Your Diary**

Your focus needs to be on making these calls. Prepare yourself.

If you don’t set aside dedicated time for your strategy sessions, then something else will come along and take precedence.

In order to know how many calls per month you need to make, go back to the calculation you did in Module 4. Don’t forget you won’t be working 52 weeks a year, therefore you might need to adjust this slightly to fit your pattern of working.

Only you can decide how many calls you can handle per day. Having 5 or 6 one after another, keeps you in the zone and is manageable. Many more than that could exhaust you. But it’s up to you - experience will show you what works best.

For most people, 1-2 sales days per week is a good average.

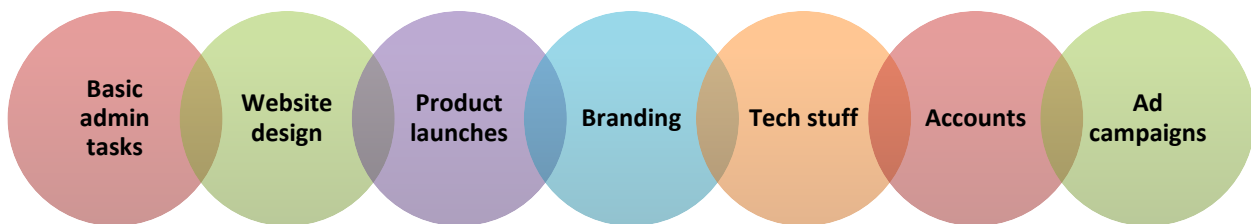
## **Time to Outsource?**

If you feel you don’t have enough time to devote to a regular pattern of sales calls, then maybe it’s time to grow your team and outsource some of the other tasks that are taking your focus.

There will be many aspects of your business that you can outsource when you’re ready for it (but please, not the strategy sessions!).

**For example:**

- Basic admin tasks
- Website design
- Product launches
- Branding
- Tech stuff
- Accounts
- Ad campaigns



Outsourcing will free up more of your time to focus on making sales and serving clients. This means that the financial investment you make will bring you greater financial rewards when you make more sales.

### ***Key Takeaways:***

1. Your business will definitely grow if you take advantage of using strategy sessions to turn your prospects into paying clients.
2. You must make your sales calls a priority and plan them in advance.

### ***Brainstorming Activity:***

1. **Quick Win:** Go through your diary and cross out the number of days a week/month you're planning to have as your sales days.

Make sure you enter these dates in your appointment scheduler.

## **Brainstorming Activity (cont):**

- 2. Get referrals.** Make a list of 10 people you know and send them an email based on the template provided

**Name 1:**

*Notes for Email:*

**Name 2:**

*Notes for Email:*

**Name 3:**

*Notes for Email:*

**Name 4:**

*Notes for Email:*

**Name 5**

*Notes for Email:*

## ***Brainstorming Activity (cont):***

**Name 6:**

*Notes for Email:*

**Name 7:**

*Notes for Email:*

**Name 8:**

*Notes for Email:*

**Name 9:**

*Notes for Email:*

**Name 10:**

*Notes for Email:*

## ***Brainstorming Activity (cont):***

3. **Complete the outsourcing task checklist below.** Think about if it makes sense for you to outsource these tasks things right away because you don’t have the time or the skill at the moment

	Now	Later
Basic admin tasks		
Website design		
Tech set up		
Accounts & invoicing		
Content writing		
Posting to social media		
Ad campaigns		
Branding		
Other tasks		

## **Module 12 - Review and Refine**

It's time to review what you've learned from the course and plan next steps in this concluding module.

### **Step 1: Review the Course**

You need to conduct a thorough review of the course before moving on.

**Remember way back in the beginning of the course, we said that once you've acquired the skills to conduct successful strategy sessions, you'll have those skills for life?**

The more strategy sessions you do, the better you'll become at the process.

Let's review your progress so far. Answer the following questions:

- What have you learned from your sales calls about...
  1. Yourself
  2. Your Prospects
- What difficulties have you encountered?
- How do you plan to address these?
- What further steps can you take to become totally comfortable with the process?

Next, make sure you've understood and applied all the steps in this course by completing the Action Plan.

### **Step 2: Set New Goals for Your Sales Revenue.**

As you start to accomplish the first goal you set for your sales calls, it's helpful to set new goals aimed at growing your business even further.

Defining new goals will help keep you focused and on track. It will also make it easier to measure the success of sales efforts.

## **Tips to accelerate your success**

Once you’ve been through everything in the course again, consolidate your skills by making more sales calls. Review your progress regularly to discover how you can make your strategy sessions more powerful and more successful in terms of sales.

Of course, you’ll want to be thinking about next steps for your business. Here are some ideas for taking this further:

### **1. Refine your client needs profile**

You’ve worked on getting inside your client’s head on this course in order to find out the results they want. And the more strategy sessions you do, the more you’ll learn.

Refine your database in 6 months’ time with the new information you’ve gathered from all your strategy sessions.

### **2. Review your sales figures**

Diarize weekly/monthly sales meetings. These could be meetings just with yourself, but diarize them anyway as if they were with your sales director (which is you, by the way). These meetings are where you’ll track your numbers and keep yourself on target. When you’re ready, increase your target.

### **3. Plan future offers**

Don’t lose the momentum you created. You have offers that are selling. Now start planning other offers to meet the needs of your customers.

## ***Key Takeaway:***

1. Consolidate your learning by practicing the core skills regularly before you go on to anything else.



## ***Brainstorming Activity:***

1. Complete the strategy session review below.

*What have you learned from your sales calls about yourself?*

*What have you learned from your sales calls about your prospects?*

*What difficulties have you encountered?*

*How do you plan to address these?*

*What steps will you take to become totally comfortable with the process?*

## **Brainstorming Activity (cont):**

2. Review the course and complete your action plan below.

**Module 1: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 2: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 3: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

## **Brainstorming Activity (cont):**

2. Continue reviewing the course and complete your action plan below.

**Module 4: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 5: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 6: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

## **Brainstorming Activity (cont):**

2. Continue reviewing the course and complete your action plan below.

**Module 7: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 8: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 9: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

## **Brainstorming Activity (cont):**

2. Continue reviewing the course and complete your action plan below.

**Module 10: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 11: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

**Module 12: 2 Things I Learned...**

1. \_\_\_\_\_

2. \_\_\_\_\_

**Action to Take:**

**By When :** \_\_/\_\_/\_\_\_\_\_

## NOTES

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## About The Author:



Do you ever wish there was an easier way to attract clients?

If you're thinking "Yes, I do!" you're certainly not alone. Many professional service providers feel exactly the same way as you because their expertise is in providing the service that they are qualified to provide, rather than in the selling of it.

And just imagine for a second how much easier it would be, how much happier you'd feel and how much more you could be earning if suddenly you discovered the secret to having a crowd of clients wanting to engage you, rather than you having to go out searching for them.

If our paths haven't crossed before, let me introduce myself. I'm Tim Dodd, a former chartered accountant and specialist business workflow consultant. In simple terms, I help clients put in place processes that attract potential new business automatically.

If you are an entrepreneurial business owner or professional service provider, who would like to automate their lead generation, prospect follow-up and business relationship building processes in order to spend more chargeable time working with your best clients, doing what you enjoy doing most, then I am certain that I can help you to achieve that goal.

If you like the idea but aren't convinced I'd be able to help your particular business, make an appointment to speak with me today and find out why I'm so confident that I can.

Just head over to [www.3dconsultingservices.com/call](http://www.3dconsultingservices.com/call) and select the appointment time that is most convenient for you.

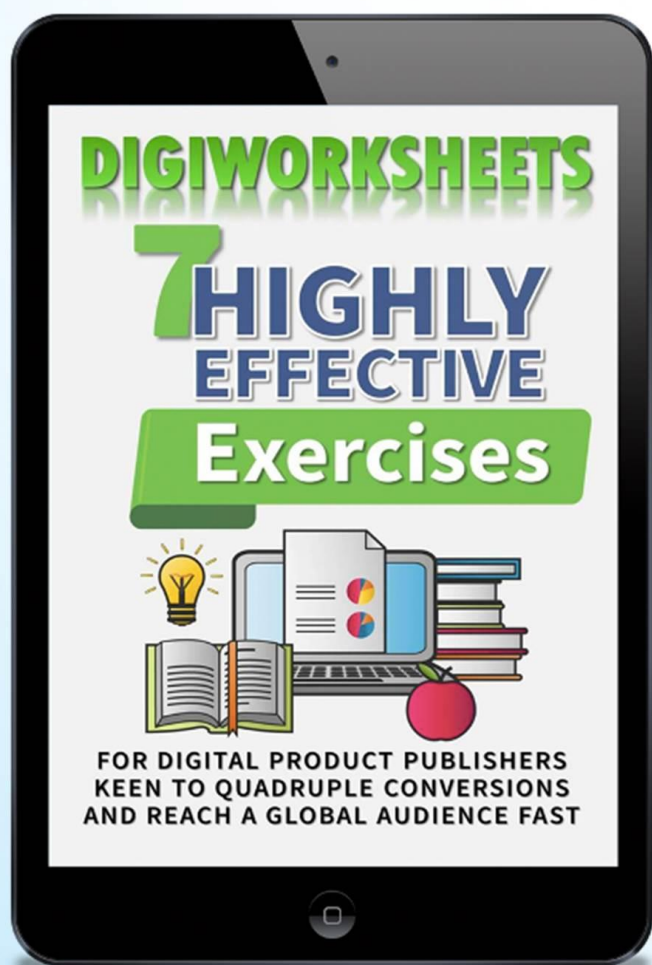
There is no charge, and when we talk, I promise to provide you with at least one strategy you could implement immediately, which will transform how you win new clients in the future!

And, whether you decide to get in touch or not, may your God always go with you and continue to guide you along the path you've chosen and were created to pursue in order to prosper and live a uniquely fulfilling life.

I truly look forward to speaking with you.

*Tim*

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