



Sales/Intake Call Process

Welcome, connecting, rapport. This should only take a few minutes - remember you're in the driver's seat of the call and need to step into LEADERSHIP.

I highly recommend watching Amy Cuddy's TED talk:

https://www.ted.com/talks/amy_cuddy_your_body_language_shapes_who_you_are?language=en

And practice some 'power poses' (it will make sense after you've watched the TED talk) for 2 minutes before hopping on the call.

What I outline below is a script/guideline for you to follow and it's important to make it your own and practice it until you find your own words and phrases that work for you.

Say:

Here's what's going to happen: I'll spend some time finding out what you really want around.....*(insert problem/challenge/outcome your client want to address e.g self care, building your creative business, developing a better relationship with your kids etc.)*

Then we'll explore a bit about what's getting in the way

Then I'll give you some very practical tools/strategies/advice that will help you in your specific situation

Then one of three things will happen:

1. If it's a good fit we'll talk about the possibility of taking this work further.
2. It won't be appropriate or a fit or maybe what we discuss gets resolved just through what we talk about on this call and there's no need to discuss anything further and we both walk away having had a great session

OR

3. It's not the right time to talk about future work etc. today so we'll schedule a follow up call in a few weeks/months.

Throughout parts 1 & 2 take good notes - if possible write down the exact phrases the client uses so that you can build rapport and acknowledge how they're feeling. It's a chance for you to practice deep listening and provide space for the client to be really heard.

Part one

This is the part where you help the client to step into the place of possibility and really flesh out what they want and why. This is important because unless they're able to see/feel/hear this, they won't be motivated enough to take action and do the necessary work to get there.

Say:

Tell me what's wrong/What prompted you to get on the call with me today?

Why is this so important?

What would you like to be different/what would you like to happen?

Fast forward 6 months/1 year/ 5 years - what would be perfect?

Why is this so important to you? What's your selfish why?

What would be affected by that if you had it?

What else would benefit if you resolved this?

Part Two

We then explore what's getting in the way of them having the results they want. What are the blocks, limitations and challenges they face.

Say:

What's getting in way? Why don't you have this now?

What's your biggest challenge/obstacle to having/achieving/getting that

How is it affecting your right now? What are the negative aspects?

What would it be like if you don't get/have (the thing they say they want?)

This is a chance for you to show empathy and acknowledge how they're feeling and give them reassurance that it's possible to have what they want (providing it is of course)

Part Three

Strategy/advice

In this section of the call, use a tool or diagnostic with the client to give them some specific, actionable advice or strategy that they can use right away. It might be a practice or a next steps, some information or a mini action plan. It needs to be easy to digest and implement and show them a clear way through towards resolving their issue - even though it might only a small step. This gives them a taste of the sort of outcomes they can expect if they worked with you longer term.

Finish strategy - then **say:**

How was that?

Tell me what was so good/useful/helpful?

If it's not a good fit:

That was great and I hope you found that helpful. I don't think it would be helpful right now to talk about working together but I wish you all the luck in the world.....

If some more work needs to be done or the timing isn't right:

I'm going to suggest we schedule a follow up call intime so you have chance to work on ... and we can see how that's helped etc.

If it's a good fit:

You would be perfect forprogram - would you like to hear more about it?

If yes:

Tell them about your program and use 'so that you...' and explain how each aspect of your program will help the client with the specific challenges and desires they told you about earlier in the call.

E.g.

Don't just say 'you get 2 sessions a month' etc. Say things like:

'we spend time looking at your particular eating triggers and uncovering some of the unhelpful self talk you're using so that we can start to unpick that for you and replace it with new ways of talking to yourself. That way you won't be second guessing yourself whenever you're at an event like that time at your sister's' wedding, you'll be able to relax and enjoy yourself because you'll have learned to trust your instincts.

It's best to have 4-6 bullet points covered what you'll walk them through as part of your package - any more than that is too overwhelming. Focus on the 'so that' to make sure you're emphasising the benefits the client will get from working with you.

Then say:

How does that sound?

If it sounds good say:

The investment is...

Or

Would you like to know the investment?

After you share the investment STOP TALKING!

If they think it's great - great!

If they have any objections then you can help them through those with some coaching.

My go to phrase (and also my mantra/reminder for myself) is that I let go of the attachment of whether the client signs up or not because it's not about me. It's about them. I want the client to come to an aligned decision. Not a yes based on fear or lack and certainly not through any pressurised selling techniques.

If their decision is No and it's an aligned NO then that's great. Maybe the timing isn't right or it's not a good fit. That's cool - there will be another coach out there who's right for them.

But if it's a No based on fear (and most fear around this is actually fear of not being able to trust themselves - will they follow through?, do they value themselves enough to do this work?) then this is an area I can coach them through.

And if it's a YES then that's the client saying Yes to themselves - to trusting and valuing themselves and their dreams/desires enough to take this step. Celebrate that step with them and congratulate them.

Tell them what will happen next - this is important to reassure them they've made a good choice. **Say:**

I'll send you out a welcome pack today/tomorrow which includes a coaching agreement, schedule of payments etc. As soon as you make your first payment you can book your first session and we can get you on your way to....

Arrange to take payment for their first month (either there and then via credit card or via PayPal/Invoice)