

Client Conversations

Summary & Script

In this PDF, you'll get the "Cliff's notes" of the exclusive talk I did to one of our high-end \$15K Virtual Coach masterminds in Portland.

It's best if you watch that presentation first and THEN come back here to see the key points. (You can watch the presentation by [going here](#)).

I recommend you print this PDF out so you can have it as a go-to reference guide. Especially when you first start doing your client enrollment calls.

This way you can quickly get a "refresher" on how to do the client conversation successfully.

And don't forget - if you have any questions at all, feel free to email my team at support@jamesmel.com.

Wishing you all the best!

- James

10 Key Mindsets

#1 - Enrollment calls are a natural part of getting to know a client

- Just another conversation with another person
- Talk to prospects every day the more natural it becomes

#2 - New Clients are the Oxygen of your business

- Your coaching practice needs sales to operate
- The more you can make money the bigger the impact you can have in the world

#3 - Your Enthusiasm is Contagious

- You have to really believe in the product or service and the results it gets
- Transfer of emotion is a big part of sales
- They will pick up on it if you do not really believe in it

- Think about the last time you convinced one of your friends to eat at a restaurant

#4 - Your role is to support somebody through the steps of becoming a client

- It's a process - You support them through it

#5 - Rapport is what gives a client's confidence in you

- It's an intimate process
- They have to trust you and have confidence in you

#6 - You are a trusted Advisor and not a salesperson

- You care about them first

#7 - As a coach your role is to help people figure out what they want

- You have to help them figure this out and figure out how to get it

#8 - You are the conversational leader

- You need to lead, this will inspire confidence in your client

#9 - Listening is one of your most powerful tools

#10 - Clients make a buying decision, you don't sell anything

- It's easy and natural
- People hate to be sold but they love to buy things
- You want to be a trusted advisor

The 6 Step Client Conversation Process

Step #1 - Build Rapport with your client

- The more rapport you build the easier it will be
- You are a trusted advisor in order to make great recommendations you need to fully understand their situation
- In order for a doctor to help you they need to share details

What is rapport building?

- Close and harmonious relationship in which the people or groups concerned understand each others feelings or ideas and communicate well
- This lowers the automatic defense system of your client, so you can help them

- Being vulnerable
- Genuinely interested in them
- Understand them
- Then establish yourself as the trusted advisor
- Show interest in them and get them to talk about themselves

3 Steps to build rapport

- Ask open ended questions and be genuinely curious about the answers
- Listen, listen, listen
- Repeat back what I heard to make sure I understand and somebody feels heard

Additional Tips on Rapport-Building

- What is more important is how you ask them: conversational and friendly tone
- Be upfront and very transparent

Give them an outline of what you will be doing together and getting their permission, it makes things so much more natural

Mindset to have when building rapport

Deeply care about my client

Imagine self as mix of doctor and detective uncovering what is going on for them

Ask alot of probing questions to start building a picture of what their situation and challenge looks like

Example Questions

How did you hear about me

Tell me a little about your current situation

What are you currently working on business-wise

How long have you been doing that?

Are you doing any other training or coaching right now?

What have you done in the past?

What did you like about it, and dislike about it?

Will Anybody else be joining you in this coaching?

Sometimes people don't like to elaborate you have to say: Oh interesting, tell me more about that

Script

- *Hi this is _ calling. I am calling for _*
- *Before we get started, let me give you a quick overview of what we'll cover today and the format for our call..*
- *I am going to ask you some questions about what you are working on, then we're going to talk about your goals together and I will help you make them as concrete as possible. Next we'll talk about your biggest challenges and what's holding you back.*
- *Once I have a really good understanding of all this, I will be able to make some great recommendations that will help you overcome your challenges and achieve your goals faster, and if I have additional resources that can help you, I let you know... Sound good?*
- *Ok great, So _ before we start, let me ask you really quick, what is your history with my company.*
- They will tell you how well they know you
- Ok got it, tell me a little about your current situation?
- You will have to dig deeper to understand their commitment level
- Ask as many open ended probing questions as you can

- This gives you information about your client and build a profile about them

How to Practice this:

- Be inquisitive and ask other people questions
- Be creative and talk to people in random situations
- Brainstorm and ask questions when you are you are thinking of asking your ideal client, try and talk to a new client every day

Step #2 - Discover what your client wants to achieve over the next 90 days/1 year

- Most people don't have clarity on what they want
- Once they have clarity then you can show them how it is possible
- It also builds rapport and help build you as a trusted advisor
- You need to have a very good understanding of their goals to position your product or service as the solution to their current situation, where they want to go and what is stopping them
- Your client is on an island and wants to get to another island, the boat they will use is your coaching
- Future Pacing
 - Most people have to see something before they can believe it
 - By support somebody getting crystal clear on their own goals they will start to create an image in their own mind
 - Your role is to help bring that picture to life and show how they can achieve it
 - Client writing down in a document you both see 90 day short term goals and 1-3 year longer term goals
- What this looks like
 - Make sure their goals are realistic
 - Make sure their goals are specific measurable and tangible
 - Make sure they feel good and is excited about what their goals are
- Script
 - *Ok so now, let's talk about your goals and what you want to accomplish. Well get really concrete on what you want to accomplish for both the short term and the long term goals*
 - *And here's the thing, the better job we do helping you get really specific goals, the easier it will be for you to achieve them. See most people don't give any thought to their goals so they don't know what they are working towards and we don't want that to happen to you and instead we want you to be laser focused and know exactly what is is you want to achieve*

- *Ok great let's start with shorter term goals*
- Most people are not very good at this, get specific amounts, what it means and what it exactly looks like
- Ask them: How will you know when you have achieved _ goal
- Ask them: how can you make that more specific?
- Ask them: How can we measure your progress?
- Okay great those are excellent goals, and I am going to be able to show you some strategies to help you get there as fast as possible
- Next let's work on some long term goals
- 1 year from now
- Fantastic those are excellent <- this will help them
- You can go even farther think 5-10 years in the future
- Great job, ___ do you see how just the simple exercise of giving some thought to your goals helps give you so much clarity because you actually know what you're aiming towards? Just having goals and targets puts you ahead of most people out there who want to do _
- Be conversational
- Lead with questions
- Asking clarifying questions to help somebody be specific measurable and tangible
- Helping your client understand the why behind their goals
- How to Practice
 - Write out your own goals that are specific, measurable, and tangible
 - Talk with some of your clients and help them with this exercise
 - Practice with a friend

Step #3 - Help them understand the Why behind their goals

- People make buy decisions emotionally and justify with logic
- The why is the emotional part
- You need to know someones hot buttons in order to enroll them: why do they want it, what are they doing it for, what does it mean to them
- Who else is involved in the decision making process?
 - You will find out by uncovering the whys
- What you are trying to do is get below the surface?
 - Most are going to be surface level, you need to ask to go deeper
 - You are peeling back the layers
- Very intimate
 - This is super important to your client, hold it in high regard, keep rapport. They never get to express this they will thank you for it

- You need to be very easy going and conversational, low and slow tone, dig deeper
- Script
 - Now the next step is even more important. You need to figure out why they are important to it. You are going to have ups and downs. In my experience the people who are willing to stay on track and are able to push through anything are the ones who have a strong WHY behind their goals.
 - *Why is that important to you? (insert the goal)*
 - *Tell me a little more about that*
 - *Ok what will that allow you to do that you can't do now?*
 - *How will your life be different if you can _?*
 - *Thank you for sharing that, _*
 - *I can now really understand why _, _ and _ are important to you*
 - *_ , do you see why this is so important to get clear on the why behind your goals*
- How to Practice
 - Talk with clients
 - Practice with a partner
 - Have someone practice with you
 - Write down the why behind your goals

Step #4 - Uncover the biggest challenge, problem and frustrations holding back your client from reaching their goals.

- If you can explain somebody's problem better than they can, they will automatically attribute you as having the solution
- Understanding the Problem is the key to adding value
 - Better you understand it the more value you can create for them
 - It shows you care and builds you as the trusted advisor
 - You want to enter the conversations that someone is already having in their own mind
- Thinking like them
 - Gets you in the mind
 - This will allow you to profile you as a typical client
 - Asking great questions
- Key is to dig deeper by asking several layer questions
- The problems they face is what will motivate them to take action
- Help them see and experience just how bad things are, and how bad things will be if they don't take action and do something different
- Script

- So, _, let's talk about some of the things holding you back right now. What would you say is your biggest challenge right now?
- Tell me about it...
- And what does that prevent you from doing?
- What other challenges is this causing you?
- How does it make you feel?
- How does this typically play out for you? Take me through what it is like on a day to day basis...
- What else? Tell me about it..
- And what does that prevent you from doing and other challenges it might be causing you?
- Continue until I find it all
- Thanks for sharing these challenges I can see how frustrating these are and the good news is I have a few recommendations I think will really help you out
- So let's recap what we've talked about so far so I make sure I understand your challenges correctly

Step #5 - Offer value, create an aha moment and give recommendations

- Most clients will be skeptical and have defenses up
- Someone who tries to sell you something you hate that
- The fastest way to lower defenses and continue positioning yourself as a trusted advisor is to offer value
- They want to solve this thing
- If you can give them a useful suggestion they will naturally want more if its an aha
- What is aha? - give away the best thing, easy short and simple
 - Usually a simple tip, technique or suggestion that can immediately help your client with their biggest challenge
 - Your magic bullet or best secret works really well, so don't be afraid of giving it away
 - Something that is easy for your prospect to implement and do right away
 - Better is short sweet to the point
 - Very good if it's counterintuitive and makes somebody completely rethink how they were doing things before
 - You want enough so you get an aha moment, don't keep training and teaching
 - Instead ask your client if they can now imagine how much easier things could be now that they know this?

- Other value
 - If you have a couple of their suggestions give those but max 3 without overwhelming someone
 - Act as trusted advisor and general have their best interest as your top priority so they leave the client conversation feeling like they got a ton of value
- What are the two or three things that you can help them with given their situation to really add value
- If you don't think they are a good fit: over them value by telling them that you can't help them, but you can learn how elsewhere
- If you can help them, mention how you can help them
- People like Options - 3 options for them
- Script
 - *So __, the way I see it you basically have three choices to help you reach your goals and get the results you want. The first choice is you can go pay someone boy to do it all for you. This is going to be the most expensive option, the good thing about it is you will get it done the fastest, the only bad thing about it is it will cost you the most amount of money and more important you don't know anything about how to do it yourself*
 - *The second, you can do by trial and error and learn everything yourself. This obviously isn't going to cost you anything but it will take you a long time because you will be spending time researching and trying to figure out __/ Plus... I have worked with ___ amount of people and the people who do things by trial and error actually spend more money in the long run, because you will likely make 1 or 2 critical mistakes you would not have made if you were getting some help and that will cost you more money in the long run.*
 - *Here the 3rd option, and this is what I consider to be the best and would recommend to you based on your situation. You get a combination of both, so you find a coach you really like, who is doing as close to what you want to be doing as possible and who has already figured everything out, then you get coached by them, get their training and don't try and reinvent the wheel. They have already done all the hard work for you!*
 - *This way you have a roadmap and blueprint and you spend your time implementing it yourself and getting the results you want. The great thing about this option is you will know exactly what you should be doing at each step along the way*
 - *Why this is so important is because as you are trying to reach _ goal, you should know everything that goes into it. You want to*

know all the different components and how they work. Does that make sense to you?

- *Okay great.. Based on your citation that's going to be the best option, so let me take a couple of minutes and help you understand a few different coaching options I can offer you to help you achieve _.*
- How to practice
 - Think of ideal client and the top 5 challengers they generally face
 - Write down some magic bullets to overcome each of those challenges
 - Talk with customers and prospect every day

Step #6 - Enrolling your client

- You can't help and serve them until they decide to enroll with you
- This is why as your clients trusted advisor if you can truly help them, you need to do everything possible to inspire them to enroll
- They will have questions and concerns before enrolling, you address those here
- They are natural
- When client says yes to enrolling, it means they feel you have correctly identified their problem and understand it
- They trust that you are the one that has the solution to help them achieve their goals
- They have made the investment in what you are offering by giving you a payment
- The whole thing is natural
- Most convos you won't have to hard sell, you will guide them through to make a buying decision
- You need to remain calm and confident, lead the conversation and ask your client to enroll
- They will pick up if you are acting insecure at all
- What to say
 - Based on what you told me about your biggest challenge and wanting to achieve _, the next step is for you to enroll in my coaching program, so we can work together and I help you achieve your goals...
 - Let Me take a minute to help you understand the option I think would be best for you, and how my coaching packages work...
 - Explain the package you feel would be best with them and why
 - Explain the benefits and tie them back to the desires and challenges

- Reverse the risk by saying: Now the great thing is I stand fully behind my coaching packages, after the first session you can just let me know and we can reverse everything.
- Does that sound reasonable to you?
- Overcoming Objections
 - First agree with them first, then repeat it back to make sure you understand correctly and then offer a solution or another way to look at it
 - Then ask for the order again
 - Often times you will have to overcome a couple of objections with your client this is perfectly normal
- How to practice
 - You have to ask for the order
 - Asking for things in stressful situations
 - Next time you are buying something at the store ask for 10% discount
 - Talk with clients

Tools of the Trade

- 1. Your Voice and Tone
 - The client will feel whatever you are feeling
 - To make your client convo easy and natural, you want your voice and tone to be easy and natural
 - When close to enrolling this is really important
 - Most people want to speed up you slow down
- 2. Tie Downs
 - Getting them to say yes, you have to get them to say yes throughout the entire way
 - Does that make sense? Right? Do you agree with that?
 - Don't overuse them
- 3. Social Proof
 - We do things because we see other people do them
 - When you can show them that several other people are doing the same thing it will make it easier
 - Use as many testimonials and examples of social proof towards the end especially
 - What most of my successful clients choose to do..
 - What I have seen most successful beginners do..
- 4. Easy Close Questions
 - Use two phrases

- Based on what you told me, the next step is....
- Make a suggestion or recommendation and then ask, “does that sound reasonable to you?”
- 5. Silence
 - Most people talk more than they listen
 - The client does most of the talking, and actually listening is better
 - Remain silent until they answer when they are enrolling

Q and A

- Refund them everything if it's not a good fit after the first session
- What to do if they have a wife who is not onboard or should not spend the money
 - This means they see the money as more valuable than the coaching
 - We want to know this and involve them in the process
 - You can have a follow up call and they are a great fit
 - Give them homework to have - then follow up with them
- How long
 - 30-60 minutes usually closer to 60
- How to get the conversation
 - Email them
 - Getting leads into your business
 - This conversation is part of moving the free line
- Client asking for discount
 - You know what you want to charge and stick to that
 - Don't get in the habit of discounting
 - Offer a shorter term or less value for the money they have
- Have people fill out your application
- When they say no
 - Its a surface level answer
 - Want to dig deeper
 - Be very conversational
 - Get the true reason (usually unsure or have no money)
 - What if we did something like this (Spreading payments out)
 - Remind them of risk reversals
- More upfront you can be the better
- Think from their point of view
- Give something extra training they can have
- We always have time for the important things
- Money is a surface level thing, if its important to them
- Ask them how important the goal is to them
- Ask them for permission to record
- Don't expect the sale and try and help people

- How much to charge
 - Find commonalities search what is out there
 - What the different options
 - If I had this situation where would I go and help them with this
- How long session: 50 minutes
- Weekly coaching creates the consistency
- Same time and same spot
- There will be common patterns with objections and you will have very common ways to work with them
- Bring up if you do nothing then nothing will change, the most important people take action, I am offering you to take action now, and we have the risk reversal as well