7 Steps to Success!

- a Complimentary Coaching Session to Assess New Clients and Close the Sale from a Value-Based Perspective

c-momentum

The 7 Steps at a Glance

Purpose & Outcome

To create value for the client regardless of outcome
To assess that the coach and client is a good match for coaching
To close the sale

1. Connect and Build Relationship	2 – 3 minutes
2. Call-Structure Set Up	2 – 3 minutes
3. Overview of Coaching	3 – 5 minutes
4. Coach!	25 – 30 minutes
5. Feedback & Feed Forward	3 – 5 minutes
6. Ask for the Business	1 minute
7. Sign Up or Overcome Objections	5 – 10 minutes

7 Steps to Success - Step by Step

1. Connect – build relationship

Thank the client for the time spent on homework

2. Call Structure Set Up

Short intro on what to expect from the call.

"This is how I conduct a sample session. We will talk a little bit about coaching, - I will answer any questions you have around that, if any. Then we'll coach based on your preparations. Towards the end, I've reserved some time for us to look at a possible coaching relationship – if I believe that coaching might be a good investment for you and if it feels like we are a good fit, I will ask you to be my client.

3. Overview of Coaching

Any questions up front? Confidentiality. I am a certified coach… (bottom line your background. I work with clients who…/My expertise is... I typically work with clients on a 6 months contract, x times per month, /In person/Phone/Online

4. Coach!

a. Future oriented, listen for the dream and the longing

- Have client describe what she wants, picture it, envision it, feel it, enjoy it, dream it, taste it, live it! Get curious about what is stopping client from having it. Raise level of awareness and believing. Hold that for the client. Coach the client, not her inner critic
- Use future self if applicable. Pure fulfilment coaching

b. The cost

- Cut to the chase. What is the cost of not…? Coach the client to get in touch with the consequence of not honoring her dream or achieving her goals. Be real, straight forward and direct

c. Narrow it down

- What one thing can you do differently/change... that would move you closer to …?
- What is your next step?

d. Create accountability/homework

- Based on the work we just did what will you do?
- When will you do it?
- How will I know? / Who will you share this with and ask to keep you accountable?

5. Feedback & Feed Forward

Acknowledge and validate the client. Tell them what you see and that you'd like working together if that is the case. State what you see as possible actions and that you'd like to work with this client. Have fun and be excited on what is possible for this client. Yeah!

6. Ask for the Business

Say it! Will you be my client?

7. Sign Up or Overcome Objections

Set a time for the intake session, explain about fees

Coach the client on her objections

Helpful Tips

Before the session:

- Send out a welcome email prior to the session, confirming dates and time, who will call and what pre-work to work on
- Be clear about what you offer - price, length of contract, how often you meet and where
- This is your business. Create it the way it works for you
- Be clear about what kind of coach you are and who you work with
- Be professional and create a great customer experience
- Aim to exceed expectations

In the session:

- Keep time
- Focus on value for the client and how you can best serve her/him
- Be clear about your boundaries
- Be the best coach you can be. Have fun and enjoy getting to know the client
- If you want to work with the client, say it!
- If this is not the right client for you, refer to another coach. Have one or two names ready
- If it is a no from the client, coach him/her around it if appropriate
- With a YES, set the date for the intake session, confirm the agreement on email and follow up with your contract