



Discovery Session Outline

Before the Discovery Session:

1. Clearly identify your ideal client via your website (so that they can self-select themselves into your programs)
2. Set up your referral process (how they apply for a GA or Discovery Session)
 - a. Determine what questions they will need to answer for you in preparation for your session as a way to “apply” for your time
3. Complete your FAQ (Overcome their objections BEFORE you speak with them)
4. Post your testimonials/case studies (Give them TONS of Social Proof to help them to understand why they need to work with you)
5. Determine the resource you will use to schedule your sessions (i.e. timetrade, timebridge, tungle, etc)

Once the session is scheduled:

1. Send them an email confirmation with their next steps in preparation for the session
2. Make it clear that they MUST complete the pre-requisites if they want to speak with you.

Section One: Set Expectations:

Tell them the purpose of the call: for you to get acquainted with them, them to get acquainted with you to see if you're a good fit.

- What made you decide to want to talk with me?
- Did you get a chance to complete your pre-requisites?
- What frustrates you the most about your life/business/relationship/health/finances OR Tell me about your life/business/relationship/health/finances challenges? (Listen for what they are struggling with.)
- What are you trying to accomplish this year?
- What do you think you need to double your business this year?
- Why do you feel you'd be an ideal client for me?

Section Two: Discovering the cost of the problem:

- What strategies have you tried to improve your life/biz/relationship/health that worked and didn't work? "That sounds frustrating and disappointing."
- How much time or money have you spent trying to solve this challenge?
- How has that impacted you? Your business? Your income? Your Health? Your well-being?



**Agree with what is wrong or the problem or what hasn't worked in order to deepen the importance of the problem.

- "What is a new client worth in terms of dollars to your business?"
- "So, how many sales/clients would you estimate this is keeping you from earning/serving?"
- ** Do the math with the prospective client, being realistic but stand in your power as to what is at stake for them. "Unless I made a mistake with my math, by not getting this problem solved, it's actually costing you \$_____"
- Wow, how does it feel to hear what this problem is costing you?
- So, on a scale of 1-10, 10 being the highest, how important is this for you to solve this problem? Why? **Reiterate why this is critical that they solve this problem.**

Section Three: Transforming the problem into possibility

- "If I waived a magic wand and in an instant, you could have this be exactly how you want it in the next 12 to 18 months, tell me what would that look like for you? TAKE NOTES
- How would it feel to achieve those things?
- How will you know when you've gotten what you wanted?
- How would your life/business/income be different?
- What would it be like if you started seeing results with how you're _____?
- What would be the best part about that?

Section Four: Offering the solution:

- I understand how important it is for you to (summarize the problem and what they want instead.
- Hypothetically, if we decide to work together and we achieve everything that we outline here, what would that be worth to you. (Best answer: priceless)
- I would love to be your coach. Is this a good time to share my packages with you?
- Briefly describe your packages with just the highlights – benefits, not features. Start with the top package (most valuable/get the best results package) and move downward. **Don't share the investment yet.** "In this package, we will _____ so that you can _____."
- As you heard, I have several options that I offer my prospective clients, however, the best option I feel will get you the results you crave the most quickly is _____. Remind them of their 1-10 number here.
- Instead of telling them about all three options, you may opt to share ONLY the one that you feel is best for them based on where they are right now in their business.

Get a basic agreement of which package is the best fit for them.

- Briefly describe your investment options, always starting with the highest and full pay option. **After you give the investment amount, STOP talking. Remember, the one who speaks first after the pitch leaves with the product☺**



If they say that was more than I budgeted, don't worry. Hold your power. Asking them very clearly what they are budgeting. Then focus on the difference between their budget and your investment (for example, there budget is \$500/month and your investment is \$1000 deposit and 4 payments of \$625 – discuss the difference (\$125) avoid saying “more” “I understand this is \$125 different than what you were expecting, let's look at what you're getting for that additional \$125)

Be willing to work out a payment plan, if necessary – **DON'T EVER DISCOUNT YOUR PROGRAM.** If you take payments, make sure you are paid in full prior to the end of your program.

Decide and take action

- “So, here's how we get started....
- “Let's get started. The first step is to process your deposit and schedule our _____ . What kind of credit card do you want to use?”

When people ask, what do you charge: I'd be happy to answer that question for you, can I ask you a few questions first?”

If they're not making a decision today, set up a follow up call to ensure that you have a conversation about next steps as soon as they can commit to make a decision.

Other Important Questions:

What is it that you want? What are you trying to accomplish?

Why?

What happens if you get it?

What happens if you don't get it?

What are you willing to change to get it?

Would you like my help?

When would you like to get help?

Why?

What happens if its not done by that date?

What else d you have going on in this timeframe?

What is the likelihood of success without help from an outside force?