

Welcome to the New Paradigm



Love's Guide to

Discovery Calls

Forget Selling,
Focus on Serving

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+ my messy, ipod-handwritten notes from
2022 to add to all this I
wrote back in 2018.

♥ Wendy

What is a Discovery Call?

WHAT A DISCOVERY CALL IS AND IS NOT

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One of the easiest ways to sell a higher-end package is to get on a video (or phone) call with a potential client to have a discovery session.

A discovery session is a chance for you to get to know a little bit about this person and their challenges so that you can determine whether or not you can help them. Once you feel confident that you can help them, you'll probably tell them more about what it would look like to work with you and give them the chance to enroll in your offering.

You can even do a lot of this via text + audio memos back + forth in Vover, whatsapp or messenger.
The world's a changin'!!

You may have heard discovery sessions called “sales calls” as well. Unfortunately, shitty marketers have given “sales calls” a bad name in most of our minds.

So, let’s start out with what a discovery session or “sales call” (as I define it) is NOT:

What a Discovery Call is NOT...

- It’s NOT a high-pressure sales tactic
- It’s NOT about “using the right phrases” to manipulate people into saying “yes” to an offer that’s not right for them (or even to an offer that might be right for them)
- It’s NOT about “convincing” anyone to work with you
- It’s NOT about “selling yourself”
- It’s NOT about keeping them on the line until they buy your program
- It’s NOT about “converting” anyone into something they’re not

It’s not about any of that at all...

I’ll bet that’s a relief to hear, right?

So then let’s talk about what a discovery call IS...

What a Discovery Call IS...

- It's about being of service to the other person
- It's about the opportunity to connect with another lovely soul on the planet
- It's about finding out ("discovering") whether or not you can help that person
- It's about *inviting* them to work with you (IF it's a great fit!)
- It's about being honest about what your strengths are
- It's about sharing confidently about what you do and don't have experience helping people with
- It's about being vulnerable & transparent
- It's about sharing information about your programs in the spirit of being of service
- It IS about claiming your value--to yourself, the other person, and the world

Sound better?

Thought so.

See, it's not that you won't sell a package on these calls (hopefully you will).

It's just about your *approach* to the call.

It's about the *goal* of the call.

Sure you might sell something at the end, and the money is definitely *part* of why you are choosing to offer this particular program. But if

Love's Guide to Discovery Calls - Forget Selling, Focus on Serving

you're in the right business, you like what you do so much you'd practically do it for free anyway. And, because you're in it to change the world and raise consciousness, it's about SO much more than just money in your bank account. It really is about SERVICE, not selling.

So any time you start to feel anxious, tense or tight about doing a discovery call, remember: *Forget Selling, Focus on Serving.*

It's About Service, Not Selling

7 WAYS TO BE OF SERVICE DURING YOUR DISCOVERY SESSIONS

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Like I said, this is not about selling. Our goal is *to be of service*.

I truly believe that every single discovery call is a stepping stone along your own soul's evolution path, just as much as it is a stepping stone along your client's personal path.

Whether or not you ever end up getting paid by this person, your goal on this call is to be of service.

There are several ways that you can be of service on this call:

#1. Listen with Your Heart

So often when we talk to someone about our challenges, they just say "Oh, don't feel bad, you're okay." or else they try to tell us what we

should do to fix it. It's rare for most people to have the chance to talk to someone and just really *be heard and understood*.

Remember, they signed up for this session because they have a challenge that they are hoping you can help them with.

This can be a vulnerable position to be in. Some people may not have even told anyone else about this problem, or they may not have talked to many people about it. Even if they have, there is something powerful about being heard by someone who understands our challenges and may have even been in a similar position before.

Most people in their lives probably don't even know what types of questions to ask to understand the particulars of their challenges. You probably do.

So this is a chance for you to delve into their challenges.

Ask about the impact this is having on their lives. It's easy for people to just get used to coping with a problem and lose sight of the tremendous stress it is putting on their lives. Sometimes they forget, or have never even experienced what life would be like without this problem, so they don't understand the impact.

Ask what they've tried before.

Ask why they think it didn't work.

Ask why they are prioritizing this now in a way that they perhaps haven't in the past months or years.

Ask how it feels to be stuck where they are right now.

Don't be afraid to ask about and drop in to really acknowledging the pain, sadness, anger or frustration they may be feeling as a result of these challenges.

These feelings are real. Hopefully you can help them shift them in the course of working with you, but for right now, this is their reality. Giving ourselves permission to feel our feelings fully is the first step toward moving through them.

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Simply giving the gift of your informed, understanding, empathetic ears and heart is one way that you can be of service during a discovery session.

#2. Share Your Confidence

Most likely, in the course of listening to their challenges, it will become clear to you that you CAN help them.

This, unto itself, is a major gift to them.

It might seem obvious to you, because you've probably helped many people in their situation before. This person, however, is coming to you *because* they have NOT been able to find a solution to this problem.

Just hearing that you, who knows about these things, actually believe that their problem is solvable is another HUGE service to them.

That's another significant way you can be of service on this call.

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Even if they don't end up working with you, you have planted the seed in their mind that there IS hope, there IS a solution, and now it's just a matter of finding their way toward it.

#3. Gather Information, Don't Coach Yet

Whatever your niche, you're practically swimming in what you do. You probably read about it, watch videos about it, take classes about it.

Chances are, this is NOT your prospective client's area of expertise (or they wouldn't be coming to you).

As you listen, it might be easy for you to recommend some things on the call that your client could do differently.

You might think, "Wendy said to focus on service, not sales, so I'll just give them some tips while we're on the call."

And this is certainly one option. (An option most sales coaches would tell you never to do.)

But I want to challenge you to think about how you can truly be of greatest service to your client.

If you are a massage therapist, is it going to be of greatest service to your client to give them a 15-minute massage now or to give them 4 months of weekly massages when they sign up for your package?

Obviously, four months' worth is going to make a bigger impact on them.

The problem is that our clients often come to us with a bathtub full of problems and expect us to help them in a teaspoon full of time.

Being honest about the fact that this is not an issue that can be worked out in a teaspoon of time (*betcha never heard that as a unit of measurement of time before!*) is again, unto itself, valuable.

Also, chances are that what might seem like a “quick tip” to you might actually be more complex for your client to understand and implement.

It's like an electrician giving you a quick tip that, “All you have to do is wire it to be a three-way switch to be able to turn the light from the switch by either doorway.”

Easy for them to say, NOT easy for you to implement because it's not your area of expertise.

Also, sometimes when you give someone a tip that they CAN do, they think that they have everything they need for the time being and may decide not to work with you after all, but will be missing out on everything else you have to offer.

Remember, this is a time for you to *listen* and *gather information*.

It's a time for you to get to truly understand the world from their point of view.

Hopefully there will be plenty of time later on for you to coach them and teach them what you know. Now is just the time for you to gather as much information as you need in order to give them a sense that you really understand where they're coming from, and to establish whether or not you can help them.

So really check in with yourself when you feel inclined to give someone a tip.

#4. Speak Your Truth

While I do NOT recommend using this as a sample coaching session, I DO advocate for using this session to lovingly call people on their shit when you hear it.

There is *a reason* that you two are in front of each other today.

It isn't by chance that you have been called into each other's lives, I believe it is your *calling* and in fact *duty* to share your gifts with this person.

It is divine guidance that is working through you on these calls, and your role is NOT to keep your thoughts to yourself. Your role is to lovingly share your honest opinion.

Notice and share the responses that pop into your head as the other person is talking.

Did they just say something that sounds out of alignment with the rest of what they said?

Do you notice they are placing a lot of blame on someone else?

Are they making excuses?

Remember, your goal is not to "make the sale." Your goal is to be of service. Occasionally, that means saying the hard thing.

Because think about it, if you don't say these things, who will?

The person is on the call because they KNOW they need help, and they DON'T know what they're doing wrong (or they wouldn't be doing it). They NEED you be an advocate for their highest good, even when it might be a little hard for them to hear.

Maybe they won't like and they won't work with you. But you can bet it'll have an impact and make a difference for them somewhere down the line.

Or, they might be sooooo appreciative that--*FINALLY*--someone is showing them what they're missing.

You never know what the outcome will be until it happens.

“

All you can do is trust that they're in front of you for a reason, that you're being divinely guided, and focus on being of service.

Speaking of which, there are still a few more ways you can be of service on these calls...

#5: Tell Them About Your Program

Assuming that you've understood their challenges and believe you can help them, ask whether they'd be interested in hearing about what it might look like to work together.

Remember, this is *an invitation*.

I've never had someone say that they do NOT want to hear about working with me, but it could happen.

If they aren't interested, so be it. You can decide whether or not you want to ask why they aren't interested.

But in 99% of cases, I'll bet they'll say yes.

And it's important to get their agreement and permission every step of the way.

Remember, this is not about forcing them through a series of questions to get to a sale.

This is about being of service.

And you can only be of service to the extent that people want to be serviced.

So once you have their permission to tell them about your program, go ahead and do it.

Start out by telling them about the overall format. Tell them how you've structured it *and* tell them WHY you decided to structure it that way. Then ask whether they think that would be supportive to them.

Even if they decide they can't or don't want to work with you, you are offering them a vision of what it would be like for them to get support in this way.

“

They may have never even considered getting this level of support around these challenges, and simply listening to you outline the way you would approach helping them is another way that you can be of service.

#6: Don't Let Money Stop You

Sometimes people are going to say yes, they know they would benefit from your program, but they just aren't in a position to pay your prices.

That's o-kay!

Your services aren't a good fit for everyone.

You are building a higher-end brand. Your higher-end packages aren't going to be accessible to everyone. But the purpose is for them to help you build a sustainable income for yourself so that you can THEN develop other offerings that ARE more accessible--without sacrificing your own wellbeing.

So, some people won't be able to afford them.

But often when people say they can't afford something, what it really means is that it's not a priority for them right now.

Most middle class people can find the resources for the things they want bad enough (a.k.a. that matter enough to them).

I have been on both ends of discovery calls where I was in tears because I couldn't afford someone else's program that I really wanted, and having someone else in tears because they couldn't afford mine.

This, almost more than any other time, is a chance to really show up and be of service.

Offer an empathetic ear.

“

Affirm that if and when the time is right, you WILL work together, and if now's not the right time, that's okay.

Affirm that if they are meant to work with you, Source will provide the resources.

Be a model of someone who can stand in your own value, while also supporting and respecting their perspective and experience.

Maybe later that week they will manifest some extra financial support.

Maybe it will galvanize their desire to find a way OUT of their financial situation.

Maybe they will start out with some of the free or cheap resources you refer them to and come back when they have more financial support.

The point is, don't give up if they get hung up on the money.

Don't break the open-hearted connection you've developed 'til that point in the session. Just keep that heart open and continue to *be of service!*

and let yourself be touched + moved by how they feel. You can be flexible about the money if it's coming from aliveness + love instead of fear + guilt

#7: Make Sure It's Sustainable for You

Now, remember, the question isn't only "How can I be of service to this person?" the bigger question is, "How can I be of service to this planet?"

If you are draining your inner or external resources, you are not going to be able to have as much of an impact as you would if you are taking good care of yourself along the way.

I want you to *only* take on clients who you *love* working with and who feel like a *great* fit to you. That's why, before I get on a discovery session, I like to have a list in front of me of my Ideal Client Checklist so that I can establish as we go, whether or not they are an ideal fit. I'd recommend you do the same.

Part of the discovery session is certainly *Can I help this person?* but another thing you're trying to "discover" is: *Do I **want** to work with this person? Is working with this person truly going to light me up?*

Be prepared to say something like: *You know, Justine, I have to be honest here, I just don't think I am the right person to help you at this time, or even: ...I just don't hear you being committed to changing your pattern, and until you make that shift, I don't believe I can help you.*

“

The greatest way for you to be in service to the person on the other end of the line, yourself AND the planet might be to say that you are not right person to help them with this problem.

How to Schedule + Host Your Call

SCHEDULING YOUR DISCOVERY SESSIONS

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Give Yourself Enough Time

One mistake many people make when they first begin offering discovery sessions is that they don't give themselves enough time for the session.

Often they start out scheduling it as a 20- or 30-minute "free consult". Unfortunately, once they get on the call, it takes the client that much time just to talk about their challenges, and there's no time left to talk about what working together might look like.

That's why I suggest scheduling your discovery calls for about an hour. This gives you enough time to hear about your potential client's challenges AND (if applicable) talk to them about your program.

So make sure to give yourself at least 60 minutes for the call.

Be Smart About Scheduling

← pretend this is on the next page

Now, the goal is to get on the call with someone, establish whether they are a good fit for your program, and if so, sign them up. After that, you can work your magic and help them create the transformation they are looking for.

The goal is NOT for you to spend an extra two hours a day emailing back and forth with people to schedule (or reschedule!) their discovery sessions.

In order to save all the hassle, make it easier on you AND your peeps, and to give you a more professional feel, the best (and by that, I mean: *only*) way to handle scheduling these calls is to use an online scheduler.

In case you aren't already familiar with the concept, an online scheduler will show clients a variety of available time slots and let them book (or reschedule!) an appointment online. Then you get an email saying, "So-and-so has scheduled an appointment for such-and-such time."

All you have to do is show up.

Pretty easy, huh?

And, if you use Google calendar, it will even sync directly with your Google calendar to automatically block off times you have marked down on your calendar as not available.

It takes a small amount of pretty easy set up work, and then it is SUCH a time saver!

Which Online Scheduler to Use?

I have tried nearly ALL of them out there and the one that I have found to be, hands-down, THE BEST for all my needs is [Acuity](#).

Many people like Calendly as well.

I can't recall exactly which feature I wanted that calendly didn't have, but Acuity has always given me the option to do EVERYTHING I've ever wanted to do with it.

AND, it's free to start and only about \$14 a month for a paid account where you can have your own professional branding and some additional features.

[Click here to sign up for a free Acuity account.](#)

(I love them SO much that I have partnered with them, so I may receive a small compensation for you clicking through the link above if you decide to sign up.

If, for any reason, that doesn't sit right with you, you're welcome to go directly to acuityscheduling.com to register. It'll cost the same, I just won't get the financial thank you for referring you. Do what feels right to you.)

Once you have your account set up, you can set it up so acuity will automatically send an email to your prospective clients giving them information about the call--such as your phone number or Zoom link.

Speaking of which, let's talk about how you're going to actually call your people...

Get a Head Start On Things with an Intake Form

Acuity makes it suuuuuuper easy to ask people a few questions when they book their appointment. This is a great place to ask, for example, their website if you are a copywriter who helps with marketing. That way you can check out their website before you even get on the call. It's also a good place to get a little background history about them.

I like to keep the form simple, so I recommend about 3-5 questions.

I always like to ask "Anything else you'd like me to know about you?" and give them a paragraph blank. Sometimes you find out the most interesting things about people with this simple, open-ended question.

What Kind of Call to Make It

Nowadays, video calls are the way to go. You can just read so much more information and energy from someone when you can see their facial expressions and body language than over a phone call.

If you're like me, maybe you've always hated phone calls anyway, so a video call sounds better anyway.

If you're already a committed Skype user, than you can probably do that, but I recommend Zoom.

Zoom has set the benchmark in high-quality video conferencing.

*clearly
I wrote
this
pre-covid!*

It's free to set up an account. With the free account, you can have video calls with two people for an unlimited length of time and group calls with 3 or more people for up to 45 minutes.

Again, I LOVE zoom and only decided to partner with them as an affiliate AFTER I wrote the section above.



[Just click here to set up your free Zoom account](#) using my referral link.

If you've got internet bandwidth or other reasons that you don't want to do video calls, you can, of course, do a good old fashioned phone call as well.

Remember, this is not only your business, this is your *life*.

So make the choices that feel good and right to you right now--knowing that you can always course-correct along the way.

I think that's about all I've got for you in the way of logistics regarding the scheduling and technology about the call.

Now let's get into the structure of the call...

The Discovery Session Agenda Overview

A Flexible Structure For Your Calls

Assuming we've got about an hour for your call, here's a quick overview of the different phases of the call and then go into each one in more detail. I'll give you a general time estimate for each portion, but know that once you're actually on the call, it's best to follow the energy and aliveness of the conversation rather than worrying about keeping to a schedule.

I'd recommend pulling up this overview and having it open on your screen (or printed out) while you're on the actual call to act as a reference as you have the conversation.

The Discovery Call Agenda

1. Tell Them the Plan

- 2. *What are Their Goals?*
- 3. *What are Their Challenges?*
- 4. *What Have They Already Tried?*
- 5. *Why Is Now the Time?*
- 6. *How Serious Are They?*

7. Summarize & Reflect

8. Ask Permission to Tell Them About Your Program

- 9. *Address Any Questions or Concerns*

10. Get Them Signed Up

Bold means this is a step where you focus on speaking your truth

Italics means this step where you focus on listening and gathering information to understand their truth.

#1: Tell Them the Plan (Speak Your Truth)

You're hopefully planning to do many of these discovery calls. This might be your clients first time signing up for a discovery session. Or worse, maybe they've been on a number of high-pressure sales calls in the past and are half-way prepared for this to be another one.

Regardless, it's best to set their mind at ease by setting the tone and telling them about your plans and intentions for the call together.

Remember, they are here because they need your help, guidance and expertise. Don't let them fall into patterns of steering the conversation.

Follow your gut and don't be afraid to interrupt if needed to set expectations for the call.

The way I like to do this is to say the following:

I'd like to take a minute to just tell you about the plan for our time together and then we can just jump right on in. Does that sound okay?

They'll almost always say yes. So then I say:

Awesome.

Well, first I'd like to start out by asking some questions to help me get a better understanding of your situation... where you're at, what brought you on to this call, etcetera. That will give me a better idea about whether and how I might be able to help you.

Once we get that out of the way and I've established whether I think I can help you, then I'm happy to tell you more about what it might look like for us to work together if you're interested in hearing.

Does that sound good?

See?

Remember when I promised no high-pressure sales techniques?

You're not being pushy.

You're not forcing anything on them.

You're coming from an attitude of being in *service* and you're *inviting* them to hear more about you *if they want to*.

'Cuz who the fuck wants to tell someone about your life passion and your carefully-crafted package when they don't *actually* want to hear about it???

Not me, and I'll bet not you.

(Yep, it actually took me 29 pages to drop what some people call "the f-bomb." That's out of character for me. Usually it would have been much sooner, but I am feeling a little tired out at the moment, so perhaps I'm just a little less feisty than usual...?)

#2: What Are Their Goals? (Understand Their Truth)

It's easy to gloss over this question. For example, if you help people lose weight and you ask what their goal is, it's possible they could just say "to lose weight" and you'd be like, *Duh, Wendy, why else would they be on the phone with me?*

But different people have different goals.

The person who is trying to lose 150 pounds is probably going to have different feelings and needs than the person who is trying to lose 15 pounds.

And that's just the superficial goal. The next question is *Why?*

Why do they want to lose the weight?

For one person it might be because they just had a new grandbaby born and they want to be healthy enough to be able to chase it around by the time it can walk.

For another person, they might be wanting to start dating but feel self-conscious about their body.

Again, someone approaching weight-loss for health reasons may need a different approach than someone who is petrified to put their profile picture on a dating site until they lose some weight.

This is your chance really delve in to what they are wanting at the deepest levels. Just keep asking, *Why?*

3: What Are Their Challenges? (Understand Their Truth)

Once you've had a chance to find out what exactly they're wanting, the next natural question is to find out what their challenges are.

Now, because this is your area of expertise, hopefully their challenges are familiar to you and ones that you have some idea how to overcome.

But remember, these are very BIG challenges for them.

But also, keep in mind they may not even be aware of what the REAL challenges are.

Let's say that you're helping someone with relationship problems. They tell you that the challenge is that their partner just *keeps* blowing up at them.

They may not have any idea that the way that they are saying things is actually loaded with blame and is contributing to their partner blowing up.

You'll have time to explain all that to them if they decide to work with you. For now, just make note of the patterns you're hearing and keep on listening.

#4: What Have They Already Tried? (Understand Their Truth)

Of course, you probably aren't the first person they've approached to ask for help with this problem.

Find out what else they've tried before AND why they believe it hasn't worked.

How awful must it be for them to have tried multiple times before and not had it work out??

Make sure to take the time to listen to the heartache.

This is also a good place to listen for red or orange flags about whether or not they are going to be a good client for you to work with.

If they tell you they've worked with several other coaches in the past on this exact thing and they seem to blame the coaches for their lack of progress, perhaps they aren't taking accountability for their own actions...

Are you just going to be the next coach they hire and complain about?

Remember back to the ways you can be of service. If you suspect that this is what is going on, don't be afraid to gently and lovingly call them on their shit.

It's okay to say something like:

“Listen, I’m hearing you talk about these three other coaches and you’re saying that it’s their fault for one reason or another.

It sounds to me like maybe you’re not taking accountability for your own decisions. Am I mistaken or do you think that might be what’s going on? And if it IS what’s going on, how are you going to show up differently this time around because I’m really only interested in working with clients who are taking full responsibility for their situation.”

How would that feel to say?

A little edgy, maybe? (Or maybe not, depending on your personality.)

But if it’s the truth and what’s coming up for you, you gotta say it.

#5: Why is now the time? (Understand Their Truth)

It's good for you AND them to understand what makes now the right time for them to work with you. This may be a problem they've been dealing with for years, or it might be something fairly new. In either case, why is this a priority for them NOW?

Is there a recent or upcoming change in their life situation?

Did they recently get a health diagnosis?

Did something shitty happen at work and now they are more motivated than ever to get their side business off the ground?

I want you to work with clients who are motivated because they are going to be the ones who are going to invest the most and get the most out of their work with.

So find out why now is the time for them to (finally) get your help with this problem.

#6: How serious are they? (Understand Their Truth)

Similarly, there's no use spending your time working with someone who "kinda sorta wants to do this thing" but isn't that committed and isn't actually going to do the work that it's gonna take.

They're not going to get good results and it's not only likely to be frustrating for both of you, but it can reflect poorly on you when they tell people they didn't get results without mentioning that it's because they didn't do what you suggested they do.

So you can ask this question on a scale of 1-10 where 1 is not very committed and 10 is totally committed.

Or, you can make it more of a conversation.

This is a good place to ask questions like:

From my perspective, this is going to require some mindset shifts. Are you ready to do the internal AND the external work for this to happen?

#7: Summarize + Reflect (Speak Your Truth)

Ahhh.... Finally...

Your information gathering is done.

You've asked a ton of questions, you've done a ton of listening.

You've really heard and understood this person's dilemma.

Now it's your turn to talk.

This is the place to sum up everything you've heard, be honest and vulnerable, and give them the bottom line: Do you think you can help them or not?

If you think you can, then your answer might sound something like this:

Well, thank you SO much for taking the time to dive in to all this with me... I really appreciate your honesty and your vulnerability.

It sounds to me like you've really been wrestling with trying to reach this goal for a long time. I'm hearing how frustrated you are with the fact that it feels like you can't make any headway.

I also heard you when you said you've tried such and such thing with those other people in the past, but I'm really hearing that you're in a different place right now and I get that now is really the right time for you to give it another try for this reason and that.

From what I am hearing, you're needing some support with x, y, and z.

Does that all sound accurate? Is there anything I missed or you'd like to add?

#8: Ask Permission to Tell Them About Your Program

Now, if they say that all sounds great, and your getting sighs of relief and big head nods, then you can probably just keep on going and say something like:

I have a little bit less experience with z, but I certainly have a TON of experience with x and y, and I am pretty sure that what I know about z, combined with everything I know about x and y, is enough to get you off and running.

I actually have a program put together that focuses entirely on x and y, would you like to hear about what it would look like for us to work together?

Chances are, by this point, if they've felt heard and understood by you, they feel hopeful that you can help them and they will be more than happy to hear about your program.

It's SO important at this step to ask their permission to tell them about the program.

This is what separates you from the shitty marketers who are trying to shove their sales pitch anyone's throat (ears?) just to make a sale.

Plus, maybe their kid just woke up from a nap. Maybe they really need to go pee. Giving them a chance to decide whether or not they are ready to

hear about your program is part of what makes sure this call is about serving, not selling.

99% of the time, they're gonna say yes.

When that happens, then this is the time to give them a general overview of the program. You don't have to go in to all the nitty gritty details of HOW you are going to help them. Just tell them them WHAT they are going to get by working with you.

Tell them:

1. The overall length of the program (i.e. 1 day, 1 month, 3 months, 6 months, etc...)
2. The time commitment from them (i.e. Is it an 8 hour intensive? Do they need to show up for a 90 minute coaching call twice a month? Will it alternate between a longer call and a laser follow up call?)
3. WHAT they will get out of this program - be as specific as you can. For example, if you're a relationship coach, don't just say you'll help them "improve their relationship." Tell them that you'll help them have fewer fights that will be less intense than what they are currently dealing with, and that they'll be able to get over the fights more quickly.

Make sure to tell them WHY you've chosen to structure the program in this way, both in how it serves YOU as well as how it serves THEM. Maybe they will sign up for it, maybe they won't, but either way, help them envision the impact it could have on them by talking about it as if they will.

It might sound like this:

Well, based on everything I've heard from you, I think my "Relationship Revolution" program is really going to help you.

It's a one-month program that is designed to transform the dynamics in your relationship quickly. When you sign up for the program, we'll schedule two 2-hour couples sessions where you and your partner will come in to work with me together, and we'll also schedule two individual sessions with me for each of you.

I've included the couples sessions because I find it's important for me to observe the dynamics between the two of you, and to save me redundancy by explaining some things to both of you. But it's also important to get some 1-on-1 time with each of you where you have a chance to share with me privately what's going on for you and to work through your own personal triggers separately from your partner.

We will work on improving the communication patterns between you both so that you'll be confident that the way you're expressing yourself is healthy and not contributing to the dysfunction.

But we'll also work on releasing the trauma each of you are carrying into this relationship so that you'll be less likely to get into those explosive arguments you mentioned earlier.

Now, this program doesn't directly address the challenges that I've heard you've been having with your team at work, but I feel confident that the clarity you get and the shifts that we make in regard to your partnership at home will have a significant impact at work as well. And if, at the end of this month, you decide you want to get the same kind of results at work as you've gotten with your partner, then we can talk more about that then.

Does that all make sense? Does it sound like it would give you what you're looking for?

Chances are they will be nodding their head yes, relieved to hear that you might have a way out of their challenges.

The goal is to find out, separate from the cost of the program, whether they think it is a good fit and could help them.

#9: Address Any Questions or Concerns

Once you've told them about the format of your program and they've agreed that it would be a good match for them, you can ask them if they have any other questions.

Just say:

| *Do you have any questions or concerns about the program?*

This makes space for them to ask questions like: *Well, I am going out of town in two weeks, would we need to start now or could we start after I get back?*

It also makes space for them to ask about how much it costs...

Talking About the Cost (a.k.a. "Investment")

Now, I usually prefer to let *them* ask how much it costs because it helps turn the whole expectation of "high pressure sales tactics" on its head.

If someone actually wants to get off the phone with you without finding out if it's financially accessible to them, then they probably weren't a good fit to begin with.

But most people who have made it this far will want to know how much it costs, but you can go with the flow and see what feels right to you in the moment.

If they don't ask, but you sense they are wanting to know, you don't have to sit there awkwardly and *make* them ask.

Just volunteer the information.

Now, I like to use the word “investment” because it highlights the fact that they are getting MORE than what they are putting into this program. The word “cost” focuses on what they are giving up or losing rather than what they are gaining.

Sometimes I use the word “price” because it just feels more natural for me in speech than saying “investment”. To me, “price” feels more neutral than cost. The emphasis isn’t on what they’re giving up, a price is just a number that’s attached a thing.

It might sound like this:

So, the investment for this program is \$1497. How does that sound to you?

An ideal client will say, “That sounds great. Let’s do it!”

Other people might express some hesitation.

Remember, your goal is to be of greatest service to the planet.

You need clients who can easily pay you for your services so that you can afford to help people who can’t.

Now is NOT the time to compromise on your pricing whatsoever. It’s a time to dive in and listen to their fears and concerns.

To *support* them in strategizing about whether there’s a way they could make this investment in themselves.

If someone is telling you they can't afford it, after you've just spent the last 45 minutes talking about how badly they need your help, then one of two things might be going on:

Either they literally can't afford it.

OR

They don't want it badly enough.

I don't ever want someone to choose between paying their rent or signing up for your VIP package. Your ideal client is someone who can easily afford your rates.

But on the other hand, part of serving this person is to take a stand for what they have told you they want.

So this is where you have to follow your gut and decide when and where to keep the conversation going in the spirit of service, and when to acknowledge that it's just not a good fit.

You might say:

I imagine it's disappointing to feel like this program could be so much help to you and to find that you can't afford the price. What I want to tell you is that I believe that you are exactly where you are supposed to be right now.

I believe that we are being divinely guided and if you are meant to be in this program right now, God/the Universe/Source will provide for you. And if you don't manifest the means to work with me, then we must ~~have~~^{not} have been meant to work together right now.

So for right now, I want to refer you to this free resource that I have for you to start with. There's also this other low-cost resource that might help you. So I want you to get started with those and know that between you and Source, if you are meant to work with me, you'll come back to me with the funds in hand and ready to sign up.

(2022 update: You might also check in with your aliveness meter + consider whether it feels right to you to invest in them by helping at a free or reduced rate. Especially when you are just starting out this can be a great way to build confidence + referrals. Just make sure you are giving to follow your own enthusiasm + aliveness, not from a specific expectation. (I never barter. I only give what I would do for nothing.)

#10: Get Them Signed Up

Now, if they ARE ready to work with you, the last step is to get them signed up.

The best way to do this is to either take their payment information over the phone or to send them to your website to sign up. If you send them to your website, make sure to wait for them to register while you are on the phone with them.

Remember, this is an investment they are making in themselves, and if they are deciding to sign up with you, then it's your job to be with them every step of the way.

Your company and reassurance will go a long way toward helping them feel confident that they have made the right decision in working with you.

... and it's also okay to let them think about it and set a time to follow up or to have them reach out to you when they are ready. Play the trust-building game, not the sales game.

Congratulations, You Did It!

So that's it! No matter what happened on your discovery session:
Congratulations!!

You've got another one under your belt!

If you've signed up a new client, then you are well on your way to being of even greater service to that person and to this planet.

If you did not sign up a new client, you have STILL been of service to that person and to the planet.

Every discovery session you have is going to give you more clarity on what you do and don't want in an ideal client.

It's going to give you more clarity on what your potential clients are or are not looking for.

There's literally no way you can lose.

Even if someone says no today, they might say yes next month or five years from now. Or they might refer you to someone else who IS an ideal fit for you.

You just never know.

All you can do is show up, be yourself and be of service!

Love This Guide?

Sorry, stopped doing these 'cuz it turns out I've Got Plenty More In Store for You *I hate weekly stuff*

Join me for my weekly drop-in online mastermind group where you can ask questions about what steps to take next, meet other like-minded entrepreneurs and have a chance to get in the "love" seat. (It's like a hot seat, only not so hot.) *my calendar*

It's just \$1 to register, then it's pay-what-you-like.

Each week is limited to just 12 participants, so make sure to register in advance.

try:
wendygarrido.com
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