The H-A-P-P-Y Sales Call Strategy System

"When your message is your marketing, selling becomes sharing."
– Baeth Davis

I first learned how to do a sales call strategy session in 2001 and I filled my coaching practice in about six months. Every person I talked to... Boom! New client. Boom! New client.

I thought, "Okay, I should learn from some other people. This is SO cool." So I studied the work of Robert Middleton, Fabienne Fredrickson, Kevin Nations, Brian Tracy and Tony Robbins. They all teach variations of this. This "HAPPY System" is a sales-call-strategy-system mash up of everything I've learned so far.

The H-A-P-P-Y System

NOTE: ***We recommend you print out this entire document and keep it on your desk for strategy calls. Follow it exactly and be amazed at what happens. Just by having this structure, you immediately establish credibility and separate yourself from the less-organized pack.***

The H-A-P-P-Y System: A SIMPLE sales strategy phone call SCRIPT for helping your prospective clients easily decide to work with you.

H = Hello

A = Assess

P = Pain

P = Promise

Y = "YES!"

***FIRST,* Screen Your Prospects** – They prove themselves to you (or your sales person) before you ever get on the phone. This process weeds out the tire kickers.

Our interested prospects fill out an application in Survey Monkey. Our office manager checks Survey Monkey every few days for new applications and then she sets up HAPPY sessions with eligible prospective clients. At the end of the call, most prospective clients become paying clients.

If the prospect is willing to do all that work to prove to you they are a great client to work with, they're already 75% of the way there. You want them to do the work - so on your coaching application page, be sure to list the name of your program, a few testimonials, and what people can hope to expect in the program.

It's not a long page. It can even be video from you… it should match your personality. **And then you give people two instructions to coach with you**, "If you're interested in mentoring with me, these are the two requirements."

a) First, you must read this entire webpage in full, particularly the FAQ page.

b) Put all your info (except pricing) on the FAQ page. It's your business, so you're in charge. You decide how you want to run your business. For example, list what days you do and do not coach, hours of availability, best type of client for you, etc.

To be #1 in your field, work with the top 20% and make them jump through hoops before they get that opportunity. By the time they get to this HAPPY strategy session with you, they're thinking to themselves, "I hope I pass this phone call, right?" Yes, right.

So, the **#1** requirement for your prospective clients: they must read the entire website, especially the FAQ page.

#2 The prospective client needs to completely fill out the application. Any incomplete applications will be deleted/denied. It must be filled out in its entirety including payment information. And no monies will be withdrawn unless the client is accepted into the program and decides to join.

By requiring payment info, you're going to get less response but more eligible people. ***You may also want to just wait until the end of the strategy session to discuss pricing and leave it off the application altogether.***

So just two requirements, they have to **read the website**, especially the FAQ. If they come to the call and ask any of the questions on the FAQ, you know they haven't read it.

And then they must **completely fill out the application** and submit it following certain instructions. Be sure to have clear instructions as to how you want the application returned to you. And give them every opportunity to respond you: fax number, email address, etc.

Now, to the HAPPY Strategy Session how-to's:

Length of Session: These sessions should be about 15 minutes to 30 minutes depending on your business. No more than 30 minutes. Do not do any coaching on the call. Do not coach yet - you don't know what the problem is yet and this person is not yet a paying client. You're here to diagnose the situation and to see if this person is a good fit for you. They're checking you out to see if you're a good fit for them.

Step 1: Hello = Establishing Rapport (1 to 2 minutes)

"H" stands for "hello." You are establishing rapport. "Hi (Name), thank you for calling in. First, let me tell you how this call is going to go. I'm going to ask you some questions and I request you to be as honest with me as you can be, okay? Then we'll see if and how we can work together. How does that sound?"

Prospective client says, "Yes."

"You're free to ask me anything you want and I'll do my best to answer you, okay?"

"Okay," says prospective client.

"Also, may I record this call for your records and mine?"

"Yes," replies prospective client.

When you are establishing rapport, avoid chit chat, don't talk about the weather, don't get into their home life because they're going to later in the call.

Step 2: Assessment = Information Intake (7 minutes)

Assessment, this is where your questions start. Please use the most appropriate questions for your business and industry.

"**How are you finances? Please tell me on a scale of 1 to 10 and why did you choose this number."** You're just taking notes. They are doing most of the talking because you don't know if you can help them or not. You don't even know what their problem is. They're going to tell you. **This call is NOT about giving answers or solutions; it is about to LISTENING to see if YOU are the right person to offer a solution.**

"How is your relationship with your family and friends on a scale of 1 to 10 and why did you choose this number?" They will tell you.

Now, if you are poor with boundaries and you want to let people ramble, you cannot do that during these calls. You have other people waiting in line and you don't want to make them wait.

You can say, "Thank you. I'm going to stop you here so we're sure to cover everything that we need to today. Thank you for your honesty and openness. Let's go to the next question."

Don't be afraid to interrupt people. You could also say, "I am going to interrupt you here because we have a certain amount of time for our call today and I want to be sure we get through everything."

Next question: **"How is your fitness and health on a scale of 1 to 10 and why did you choose this number?"**

Listen and take notes.

"Finally, please rate your faith and spirituality on a scale of 1 to 10 and why did you choose this number."

You want to spend 2 to 3 minutes on each question. If you're doing an hour call (which I think is too long) you can spend five minutes on each and/or add additional questions.

For finances, I find that the majority of the time people want improvement in that category no matter how much money they have in the bank. They usually rate finances at a six or lower. The person can be a gazillionaire but they'll say something like, "Well, you know I have millions but my brother-in-law is suing me so I'm playing it safe." A lot of our creative energy gets tied up inappropriately around money.

The family and friends category often goes either way. Some say, "Oh this area is covered. I have a great marriage." Or, "It's really in the toilet." I find this category is extremes, great or terrible.

With money, the majority of people have complaints. Family and friends – usually an extreme good or bad response.

Fitness is about 50% positive and 50% negative. Either "I'm really fit and healthy" or "I need to get more exercise."

Now this is what cracks me up. You get to the faith and spirituality category and nearly every time, a prospective client says, "It's an 11."

And I think, "If their spirituality is an 11, how can the other areas be suffering so much?" That's when I'll usually dive in and say, "Oh really? Do you use what spirit told you?"

And the prospective client says, "Well, no, that's kind of the problem. I'm hoping you can inspire me to act on what my guidance tells me."

We are funny creatures!

It's amazing to me that people feel very connected and very much in faith about this infinite universe but then don't trust it one bit and their lives don't reflect it at all.

It's quite disturbing to me. Most people possess zero faith in what they say and believe because if they did have faith, there's no way these simple material things would be hindering them so much.

You know if you're not getting the financial result you want it's not because you're not working hard enough. It's because something's not being dealt with internally and you lack sufficient and proper information to be successful.

You don't have a system. You don't have a simple system for making the sale. Once you have this information, you might say, "Why didn't I learn this in high school? Why aren't they teaching this in high school?!"

Alright. So, you conduct your assessment and your prospective client tells you their spirituality is at an 11. I just shut my mouth.

Step 3: Pain = Reflect What You Have Heard Back to the Prospective Client (3 to 5 minutes)

"P" stands for pain. This is where you reflect back to the prospective client what you think you've heard.

So "(Name), I want to be sure I heard you correctly. I'm just going to repeat back what you said."

(Sometimes I type as the prospective client is answering the questions.)

"I'll just read it back. Will that be alright?"

You said, "Finances are really in a struggle and it's affecting your business. Everything else seems to be in pretty good shape. Is that why you're here today?"

"Yes," client answers.

"Okay."

Take the time to go through each answer and reflect it back to your prospective client. Ask them if they have anything they'd like to clarify or add.

Step 4: Promise = Bask in the Possibilities (3 to 5 minutes)

"P" is for the promise of their future. Explore with them their "IDEAL DAY." This part of the call is very revealing and exciting for your prospective client. It also gives you an idea of whether or not they are future focused. If they have trouble answering this, you are going to have issues coaching them. So use this question in particular as your "flag" for whether or not you want to coach with this person or have them in your program.

"(Name), please share with me from the moment you wake up in the morning until you lay down your head down and go to sleep at night, what your ideal day looks like." The IDEAL day reveals to you exactly how that client actually wants to live their life.

She might say, "I awaken in my 1000-thread-count Egyptian cotton sheets next my beautiful partner/lover/husband in my house by the lake. I go to Pilates and then my chef serves me breakfast." Many women's ideal days tend to start out this way.

She continues, "And then I work with a few clients and then I have a delicious lunch and then I get a massage. I work with some more clients and then I have dinner with my husband and we take a walk around the lake and then we have great sex and then we go to bed."

I say, "That sounds great. That sounds great and totally doable. If you spend three of those working days with clients and two days on marketing, you can likely build this thriving business and live your ideal lifestyle."

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support@YourPurpose.com
(888) 518-4263 Toll Free US & Canada

Now your prospective client becomes aware of the gap between where they are and where they want to be.

So you ask her, “What is the gap between what it is you just described as your ideal life and what you just told me in your answers to the earlier questions? What is that gap for you?”

As they share their insights about the gap, they are reinforcing to themselves they can’t do this alone. None of us can do it alone. None of us are where we are today solely through our own doing, are we?

Our spouses, our children, our coaches, our mentors, our doctors have helped and guided us. We need each other and that gap indicates this requirement for support.

Personally, I find these strategy sessions to be a spiritual experience.

Step 5: “YES” = Helping Your Client Decide (5 to 10 minutes)
“Y” is for ‘yes.’

Now, I have a little caveat here. We love it when a prospective client says ‘yes’ provided that they’re your ideal client.

The key here is a DECISION.

Once the decision is made, TRANSFORMATION BEGINS.

So you want to keep checking in with yourself as you’re going through the session and ask yourself, “Is this an ideal client?”

Now sometimes I’ve had people come to me and their problems are so intense that they really require a psychologist to help them.

You may feel that there’s something not right and that you’re out of you element.

Coaching isn’t always the right avenue because coaching isn’t about psychotherapy.

Coaching is about where you are now and where you want to go in the future.

It isn’t so much about re-examining the past. And when clients have big emotional stuff come up I say, “You probably need a therapist, too.” And nine times out of ten, they say, “Oh, I have a couple.” “Don’t worry. I’ll bring this to my therapist.”

We probably all need a coach and a therapist because when you need to process emotions you need someone skilled in that. You know sometimes if a person has a breakdown or a psychotic break or they're not on the right medication, it's a big deal. So be sure that you check in and really trust your intuition.

Am I excited about working with this person or not? That's your indicator.

Do I feel I can really help this person? That is what you really want to do in the end.

If you connect with them and they connect with you, you hope for a 'yes.'

However, your goal at the end of the call is to bring them to a decision.

So I'll give you a script for the end of the call.

You gone through the hello, your assessment, you've reinforced the pain and you've looked at the promise that is on the other side of the pain.

You've openly addressed the gap from where they are to where they want to be.

And at that point if you feel you want to work with this person, you'll continue to the "yes" step.

However, if you don't feel it's a good fit, you might say, "I don't know that this is a good fit. And this is why I don't feel that I'm the qualified person to help you with what you want to achieve."

And if you can refer them to someone, great. However, they may not even ask. They may be relieved. Very rarely will you even have that situation because of the sequence you made them go through to get on the call. If you feel that way, say it. You don't even have to go to the decision step in the process.

At the decision point, if you truly like the rapport you have with the person, you might say something like, **"I would be honored to work with you. I see and feel us working together. I think this could be a lot of fun and I feel fairly confident that with good commitment and work on your part and your willingness to trust this process, to trust your coach, you can achieve what it is you want to achieve. How does that sound to you?"**

Prospective Client: "It sounds good."

You: "Okay, I'm going to share with you my coaching packages so you can see where you might want to begin."

Start with the highest priced package, then the middle, then the lowest.

You continue, "Well, there are three ways you can work with me. Would it be okay if I share them now?"

Prospective Client: "Yes."

"There's my Platinum program that includes blah, blah, blah and here's the price." It's your highest price. Let's just say it's $4997.00.

"Then I have my Gold program" and you take away a few benefits away that are including only in the Platinum program.

"So it's similar to the platinum program but it doesn't include this, this and this but it does include this as a map and its $2997.00" and however many sessions a month, and then explain your Silver package, whatever your Silver level is.

I prefer a six-month commitment and only will do three-month commitments at this point in my career with people I have already worked with. And some of them can go month to month because you know they're good for it and they're fun to work with. And sometimes they come for a month and then they go away and come back for six months, that's fine because they know what they need.

For a new client, I say, "I strongly suggest a six-month commitment and this is why. Number one, you will hit resistance guaranteed, anywhere from three months to six months into our coaching process. You might want to kill your coach. You might want to divorce your husband and maybe that's a good idea, maybe not. Everything in your life feels like out of control and you may want to blow up your support. So my job is to have you commit on paper to move right through that because you've signed your name for six months.

And number two, it's enough time for you to see results so you can feel like you've made a good investment."

And at this point, I ask them, "And how will you know that this coaching has been a good investment for you?"

And they'll tell you what they desire. Remember what they say – write it down. "My finances are more smooth. I will create a successful business. You're going to teach me how to enroll new clients and I'm fit and relaxed."

As a side note, please know that everything I'm teaching you, you can pass along as teachings to your clients.

Pass this HAPPY sales strategy session along. It's changing the world, right.

Alright. Now you've told them about the six-month commitment, you've told them about the packages. Now this wording came from Fabienne Fredrickson.

I love this word. "**Hypothetically**."

You've just shared your coaching packages.

Now, you say to the prospective client, "Hypothetically, which package would you choose?"

Most prospective clients will say, "**Hypothetically**, I would pick your Platinum package."

Then you say, "Well, hypothetically, when would you like to get started?"

And the prospective client says, "Yesterday?"

You say, "Wonderful. I'm excited to have this opportunity to work with you."

This is your "yes." It's important you seize the moment.

You continue, "In order to put things in motion, I'm going to need a deposit to hold your spot." $500 or $1000 is usually sufficient, depending on what the package is.

I recommend the deposit is about 20% of the fee for that first month; and if it's a big program, than 20% of the whole program. Get their credit card number details (cc number, expiration date, CSV code, billing address) then tell them the next step:

"So, we're going to process this deposit by you within 48 hours. My office will send you the "next steps" package to continue our work."

[If you don't have cc capabilities, I suggest you get them. In the meantime, you can use PayPal, for which you pay about 2.5% in fees, or the client can send you a cashier's check.]

You'll want to create a "next steps" or "getting started" package for your clients so they know what's ahead. This creates security and reinforces they made a good decision to work with you.

Your package includes the coaching agreement that stipulates the length and terms of the agreement. It will be confidential.

You can include a prep form for the client to fill out before each call and any other educational or preparation materials pertinent to your work.

Many people like accountability. Many clients require tons of structure and tons of accountability until they don't anymore - until they start seeing results and often, beyond. When you start seeing money pour into your bank account, it is very motivating.

Alright, so that's the process if the prospective client says, "Yes."

Then there are the "no's."

If it's a "no," know that you planted a seed of goodwill by being an excellent listener and guide. Thank the person for their time and let them know -- if you really like them and you want to work with them -- you're available any time if they want to reconsider working with you.

The prospective client will appreciate the ease with which you've concluded the call – and no pressure.

They may be saying 'no' because they really don't have the money – it would be irresponsible to take on the expense. Or they realize they're in six other coaching programs and they tend not to finish what they start. Whatever, it doesn't matter, it's not about you.

Another segment of people will be a 'maybe.' Being aware of "maybe's" is how you can close 90% of all of your strategy sessions.

Ask the prospective client, "What will assist in making your decision?" Or you can ask, "What do you feel is in the way of you making a solid decision?"

"Well, Baeth" says prospective client, "I want to do your Platinum program but I need to take some money out of my IRA to do it. I know it's going to be worth it but I have to talk to my husband. We have an agreement that any expenses over $1000.00 -- that I'm going to make personally -- I just run by him so he's in the loop. He doesn't like surprises and we have a healthy marriage. I want to keep it that way."

I say, "So when can you talk with your husband?"

"Well, he gets in tonight from a trip and I want to give him some time to decompress, so…"

And I say, "Well how much time do you need?"

She says, "Well, I can talk to him tomorrow and I'll let you know Tuesday."

I say, "Great. What time Tuesday should I call you?"

She says, "10 am Tuesday would be a great time."

"Great. I'm putting it in my calendar. My assistant will be following up to confirm this call. I will call you at 10 am on Tuesday. If I don't hear from you, I'll assume some emergency occurred. I'm not going to chase you down so please mark your calendar also."

10 am Tuesday comes around.
This is what you say, no chit chat:

"Hi, name."

"Hi, Baeth."

<u>"So where are you in your decision making process?"</u>

Just cut right to it, no chit chat.

Prospective client says, "I talked to my husband and I'm in. I'm going to wire you the money for the Gold coaching program."

Some people realize they're in over their head. If they have a hard time saying 'no,' they will miss the bookend call. Let it go.

Do you really want to coach someone that you have to track down? They're already telling you who they are.

Easy-peasey, does the prospective client pick up the phone for the bookend call?

Follow this HAPPY script. I've kept it on my desk for three years. I have it memorized now. When I don't follow it, it doesn't work as well. I get maybe 60% success and if I follow this, 90% success. It works. It's been studied, it's been tested.

The pain, promise, proof and the price and you've just purchased something you desire.

And if you like the strategy session, you're happy to buy because you wouldn't be on that call if you weren't keen to coaching with this person. The fact that the coach has taken you through this process -- aren't you impressed already? YOU want to learn this system to enroll your clients, right? YES!

Side bar. Baeth interviews two of her clients:

Baeth:	Sharon, how did you feel conducting your HAPPY strategy sessions? How was it for you?
Sharon:	Well, I think it was just an act of love.
Baeth:	'An act of love.' And how was it for you, Kamal?
Kamal:	Yes, it was very empowering.
Baeth:	Very empowering because how often is it that we're just listened to?

What you're really giving a person is what Sharon and Kamal are describing.

You are offering unconditional love and service by listening. You show that you are actually listening with your full attention. That's one of the rarest, most precious gifts and one of the most amazing commodities in the world -- your full attention.

May you fill your practice with ideal clients with ease!