30 Minute Strategy Session Set-Up

All sales are asking the right questions, to the right people, in the right way and at the right time. ***IMPORTANT NOTE:*** *The following was created by a number of different Profitable Partners working together to come up with a script. This script, process and technology will most likely need to be modified to meet your specific needs. Please talk to your ActionVision coach to assist you in the customization of this system, process and script.*

Purpose

To empower individuals to have confidence in asking 14 minutes of questions and then taking 16 minutes to get individuals to know, like and trust us to where we are able to present solutions which change people's lives and help us all to earn a whole lot of money. :-) WIN WIN WIN!

Some are referring to this as "The All-Star Treatment."

Quick - Fast and Easy :-)
Scripts to get Leads to accept strategy sessions:

REMEMBER: Get in the HABIT of asking everyone you have a chance to meet and converse with the Biggest Challenge Question! This will get give you practice and help you to learn to overcome any awkwardness or anxiety when asking strangers personal questions.

" What would you say the biggest challenge is you are facing in any area of your business or life?" (Do not reword or rephrase the BC aspect)

Answer: Interesting………..I would love to connect more with you about this challenge can I get your contact information? (this is very important for follow up)

Example Below:

" Hi ___________, my name is ______, How are you doing today?
AWESOME What would you say your biggest challenge is that you are
facing in any area of your business or life right now?"

Response: Intresting … Myself and my firm do business in very different way than
others in our industry. We are apart of legacy partners and we have developed
a simple and easy three step process * to determine if or how *
we might give you a prescription.
Does it sound like a good process for you___________? could I start?

Example #2:

"Hi _____________my name is ________ I work with a CPA firm in the area and we are doing some research on what you feel your biggest challenge is in any area of your business. We work with a gentleman who helps us with these and we feel he would be able to give you some great insight in that area. Can I schedule you for a free 30 minute strategy call? "

IMPORTANT: Within 24 hours get a follow up email or make a phone call saying something along the lines of:

" I appreciate you sharing with me your biggest challenge regarding______________ I think you might benefit from a FREE strategy session where we can talk more about your challenge. Can I schedule you for the free call?"

[If they hesitate] " It will change your life……. in 30 minutes you will have amazing results, I was blown away I could not believe how much it revealed to me."

Setting up the Calendar Appointment:

1. Access the calendar of the facilitator that you choose to complete the strategy call.
2. Confirm a good time for the client that meets the client and facilitators schedule.
3. Click on the time(select only 30 minute blocks) - Make sure you have keyed in all information correctly - This is very important, the facilitator does not know this person and it is important that you get all this information absolutely correct. Give as much detail as you can in the details.
4. After that has been scheduled notify the facilitator that you have scheduled them an appointment.
5. Send the client a 7- minute survey link to be filled out prior to the call (encourage them to fill this out) This will speed the phone call along and help us to better serve the client.

For more Details on how to set appointment SEE the Calendar Appointment Checklist and Print it Out to help guide you.

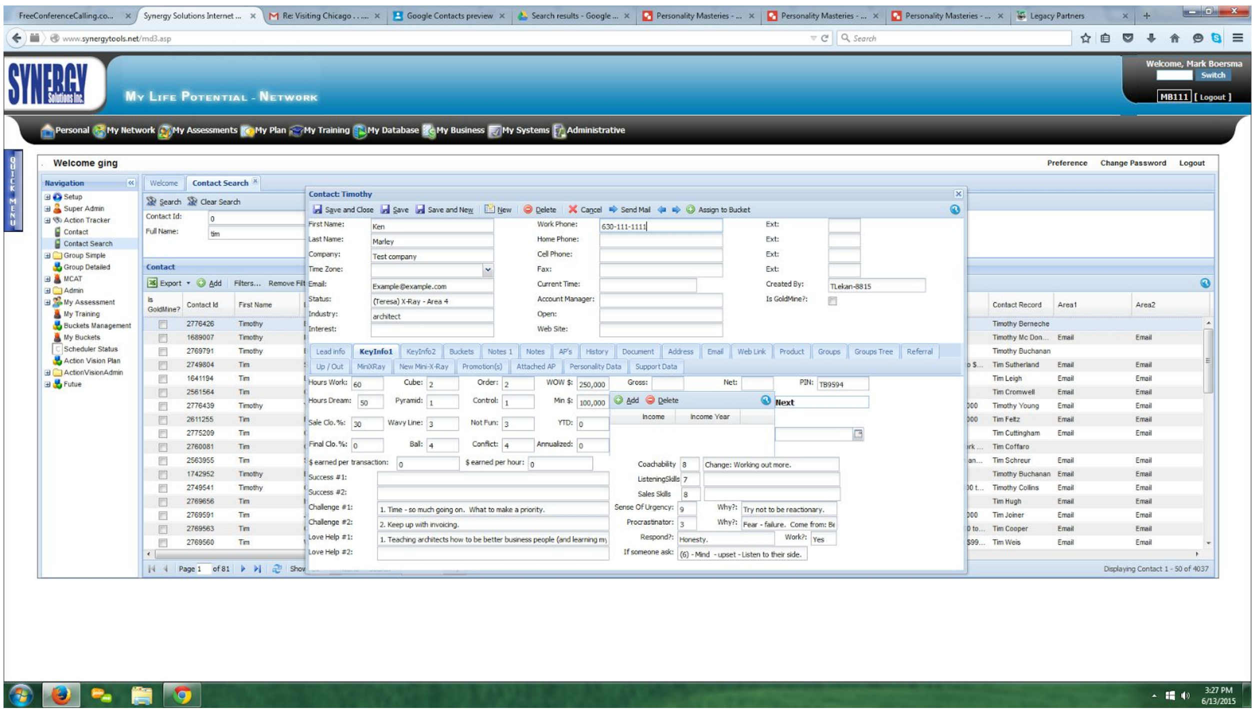
Completing the Strategy Call:

Note: Use the client's name often

Tone of voice is important, so keep it casual, natural sounding.

We'll get started - do you have any questions before we start?

In an ideal world, everyone who could, would use MCAT to store all the data. If using MCAT then most of the information is stored in **KeyInfo1** tab. If not using MCAT then use spreadsheets in most situations.



1. The Set-Up - www.TheVisionProject.net/LP_30min_Setup.htm

Example of script below:

“Welcome__________________How are you? (...they respond)
“Excellent I appreciate you being open to doing this session. Do you have any Questions before we start?”
“In this process the 30 minute strategy session we feel will really help you, any questions before we begin?
“excellent…..”

- “What is the one thing you would like to accomplish today?”
  “Nice……”

Before going into questions: Explain below:

“We are going to go over the big picture process. We have a 3 step process to see if we can really help someone.”
“Just like no doctor will give you a prescription without an exam the same thing is true with us.We do not know if our products/service will bring you benefit without getting to know you.”

Go Through **The 3 step process Examination-Solutions- implementation.**

1)Examination- “In the examination it can be a simple short series of questions or be a more comprehensive assessment it really is really up to you.”

2) Solutions:
“We have found that there are 3 different levels of people.” **Explain below**:

Basic- These people know they need to do something different they are not sure what or can be limited financially. The basic level is a great way to get started doing something and is ideal for those who need to understand the entire process in detail. Also it is a good level for those who do not have a great sense of urgency and who do not have much of a budget to invest.

Intermediate- These people are creative individuals, very intuitive, and they tend to jump right in. Intermediate solutions tend to be for those who trust their intuition and they move very quickly. With this we do not typically recommend that individuals get started right away, but to start once they start to see success on their intermediate solution. Does that make sense__________?

Advanced/Implementation - _____________some people tend to like to move quickly while others will tend to like to wait and or do not have a high sense of urgency. Our solutions ___________are customized to meet the specific needs of our clients so we can move as fast or slow as you would like. This takes a little more time to develop and that's fine, it is up to the individual.
*We craft a solution that works for the exact time frame that you're looking to move in. Does that make sense?

Getting to know them time:

Questions about their success:
"What are a couple of reasons you can contribute your success too?"

Questions about their challenges:
"What would you say is the biggest challenge you face in business or any area of life right now?"

Questions about what they need help on:
"If someone could help you in any area of your business or life what would you like help on?"

Personality analysis:

1. "I have kind of a weird question for you but it really helps me a lot just intuitively which 4 shapes would you tend to like the most? **cube** **pyramid** **wavy line** or **ball**

2. Which of these would cause you the most frustration in any area of your life?
    - Things not being done properly or in order?
    - Things being out of control?
    - Things being boring or not fun?
    - Conflict with others?

Factual Questions:

1. How many hours do you work a week?
2. How many hours would you like to be working?
3. What do you currently earn YTD?
4. What would be your "WOW" income something that would really rock your life?
5. On a scale from 1-10 how coachable would you say you are?
6. If you could change one thing about yourself what would you change? Why?
7. On a scale from 1-10 how good would you say you're listening skills was?
8. 1-10 how good would you say your sales skills are?
9. 1-10 how good would you say your skills are in persuasion?
10. 1-10 sense of urgency?
11. When you are urgent what causes your high sense of urgency?
12. 1-10 how bad are you with procrastination?
13. When you do... why do you procrastinate?
14. How quickly do you take action?
15. If you were being coached professionally and your coach thought you were procrastinating what and how would you want them to address it?
    -How would you respond?
16. Have you ever said you were going to do something and didn't follow through?
    -When was the last time?
17. How often do you do this?
18. Have you ever had one on one coaching?
19. Was it a positive or negative experience?

Goal Setting:
What is the 3 most important things you would like to accomplish in the next 90 days?

1.
2.
3.

Improvement questions:

1. Is there any questions I should have ask or didn't ask ?
2. Anything you would like to add or any questions you would like to ask me?
3. If money was no option what would you be doing right now if you could?
4. Any questions?
5. Is there any other information that we should know that we don't?

After questions wrap up the call: Let them know when you intend to follow up with them!

Additional Resources:

Video training on Level 1 questions & set up:
http://www.synergytools.net/includes/mtr/training/flash.asp?filename=120817_Fri_11_00_LV.swf