



Book More Clients

One on One Strategy Session Template/Worksheet for 30 minute session

Build Rapport:

You: "Hi _____ It's Sheri, How are you today? I am really looking forward to our call."

Prospect responds

Casual Conversation (3 to 5 minutes).

Give an Overview

"Let's jump in. I want to give you an overview of what we will talk about today during our ____ minute call. First, we will discuss your goals, then we will talk about some solutions. You will have the opportunity to ask questions, too. Then, I will let you know how to get started with me and how I work with people. There are no strings attached to this session, and I won't pressure you at all to coach with me. How does this sound?"

Prospect (They always say something like- sounds good).

Discuss Goals/Dreams First

You: "Great. Let's get started by talking about your vision or what you would like your life/situation to look like."

Note: Your prospect will always want to discuss problems first- but start with where they want to be first.

Prospect; Tells you their goals/dreams (5 minutes) (listen actively, clarify where you need to, help them to build an exciting picture of their dreams.

Discuss the Problems (they are coming to you because they have a problem or problems they want to solve)

You: “Okay, I think I have a clear picture of your goals. (Restate their goals). Now, let’s look at how things actually are for you right now. What’s going on?”

Prospect starts discussing the problems (5minutes). (This can get emotional- hold the space for them, be supportive, but don’t get to the same level of emotion). Listen actively, ask questions, restate for clarification.

You: Offer one to three solutions. (5 minutes) Active discussion with prospect

Create a Bridge

You: “We have discussed some solutions for you. If you could solve (list all of the problems they mentioned during the problem part of the discussion), is that something you would like?” (they almost always say yes).

Discuss Your Packages

You: Okay, this is how you can work with me. (Explain your packages with benefit-oriented statements, give the most expensive/highest value package first. Pause and let them respond.)

If your prospect says yes, then say. “Great, I am so excited to work with you. I will send you an invoice and a coaching agreement over email. Once you pay your invoice, I will send over your intake forms. Let’s get your first coaching session scheduled. I have these appointment openings _____)”

If your prospect says no, ask for clarification on the reasons why. Then you can offer lower price packages.

If your prospect says, “I need to think about it.” Schedule a follow up call. Say, “Okay great. I will email you within the next day with a recap of our conversation. Be sure to email me back with any questions you have. Would you like to schedule a follow up call?”

If your client says, “no.” Thank them for their time. Restate the solutions you offered and wish them well. You can also ask if they would like you to connect with them in the future.(It might be no now but yes later).

Note: you can also address objections. Ahead of time you can think of objections and have answers prepared for common objections like, I can’t afford it. (offer a payment plan) I don’t have time (I know how you feel, most people are busy, I can show you how to make the time for the things you really want to do.) I don’t think I can change this (I know how you feel, change can be intimidating. I would be with you every step of the way to help you make the changes that you want).

End on a positive note. Always thank them.