Marketing for Health Coaches

Success Mastermind

Closing the Deal & Enrolling More Clients

As we’re working to send more potential clients your way, I want to make sure you're poised to get as many of them as possible to say "yes" to working with you. In this handout, I share my formula for initial consultations and some strategies I use to close the deal.

Offering a free initial consultation (also called a Get Acquainted Call, Strategy Session, Discovery Session, or Breakthrough Session) is a great way to turn a potential client into a paying customer.

I’m going to give you a structure for your free initial consultation so that you can lead these sessions with confidence, and enroll more clients.

I’m sharing:

- How to frame the conversation from the beginning, so you’ll never come off as salesy.
- Specific questions to ask, and in what order.
- How to make an offer at the end in a way that flows and feels natural.
- How to use these calls to help you write powerful marketing copy.

Let’s get started!

Should you use an intake form?

Many coaches ask people to fill out an intake form or health history before speaking. This can be a great tool to help you prepare for the call, however, it’s not absolutely necessary that you do this.

When considering whether to have people fill something out beforehand, take into account your style and your audience. If your audience is people who don’t have a lot of extra time on their hands, having them complete a long form before they speak with you may feel overwhelming. You want to keep the barrier low so that speaking with you feels like a pleasure, not a chore.

Breaking the ice

Start the calls by breaking the ice. You're going to be getting fairly personal, so it's important that the other person feels comfortable and safe speaking with you.

If you're speaking with someone local, find out how they were referred to you and use that as a jumping off point for the conversation. Discussing your mutual love of a local yoga studio will make you feel more familiar to them.

If you are speaking with someone who is not local, find out where they are from and ask them about their town or state. Perhaps you can relate to having visited where they live. If not, ask them to tell you a bit about it. Starting the call off with small talk can put both your prospective client and you at ease.

Framing the call

Once you've broken the ice, let them know what they can expect out of the call. You might say something like, "The way I structure these calls is:

- First, I'm going to get an understanding of what's going on for you
- Then, I want to understand what you've tried already, what has worked and what hasn't worked
- From there, we'll talk about your primary goals
- Then at the end, if you're interested, I can share how I work with clients

Then ask them "how does this sound?"

It's important to ask this last question, because you want them to buy into the process.

This way, when you get to the end of the call, they won't be surprised when you ask if they want to hear how you can support them. And you won't have to make any awkward, sales-y transitions into that part of the conversation.

Remember – people are reaching out to you because they want and need help. It would be odd if you DIDN'T tell them how you could help them!

Specific questions to ask

After you've explained the structure of the call, you're going to get into the heart of the discussion.

Start by asking, **"Tell me a little bit about what's going on and what prompted you to reach out to me".** I like this question because you aren't making any assumptions or leading them. You want to get them to open up and tell you how they are feeling.

They might say “I’m tired all the time. I need more energy”. Start with empathy. You are there to connect to build trust and respect and let them know how you can help. Relate any personal experiences that you may have or other clients that you’ve worked with who’ve had similar struggles.

As they begin to tell you what is going on for them, **make sure to ask follow-up questions** so that you can get as much information as possible. Get them to talk about both the physical and emotional symptoms they are experiencing.

After they give you their initial concerns, ask them **“what else have you been experiencing or struggling with?”** You’d be surprised by how many people share more information when prompted with this question.

During this part of the call, it’s important to consider if you feel you can you help them. Are they a good fit for your practice?

Once you’ve gotten a good picture of what is going on for them, ask “**How long have you been feeling this way?**” Then ask, “**how has [insert struggle] been impacting you? What has it been like for you?**” They might say something like “I used to play tennis and I wish I could still do that” or “I have had no energy for a year and I haven’t been enjoying life”. They might be general or specific with you. Either way, ask “**what else?**” Get them to open up.

It’s important to next ask, “**What have you done so far? What changes have you tried?**” Ask them to talk about people they’ve seen – doctors, practitioners, etc. Then, dig in to find out how those things went. **Find out what worked and what didn’t work and why.**

After they share that, relate back to something they said by saying, “**we’re speaking today because you [insert the areas they’re struggling with]. How would you *like* to feel?**” You want them to connect with their desires and how they want things to be.

Get them to tap into the bigger why by asking “**If you [insert the desires they shared], how would that make a difference for you?**” For example, earlier in the call they might have shared that they want more energy. When you ask, “how would having more energy make a difference for you?” they might share that it will allow them to travel more and experience more adventure in their life. In this case, what they’re really looking for at the end of the day isn’t more energy, it’s more adventure.

At this point of the call, you’ll want to take a moment to acknowledge how difficult it can be to share all of this personal information. “**Thank you for sharing! I know it’s hard**.”

How to make an offer at the end in a way that flows and feels natural…

Start this section of the call by echoing back the highlights of what they shared – what they’re struggling with, things they’ve tried and how they’d ideally like to feel.

Provide them optimism that things can be different and that this is exactly what you work on with clients

You'll then transition into speaking about your services. You may say something like "**There is so much conflicting information out there. It doesn't have to be so hard. [Insert personal story if relevant or relate a story of someone you helped.] I know that you can feel better and I'd love to support you. Would you like to hear how we can work together?**"

You already mentioned at the beginning of the call that you'd be discussing this at the end, so the potential client is expecting it and has given you permission to share how you work with clients.

When you talk about your program, you want to focus on the areas they expressed wanting help with. "**I know that you've made dietary changes in the past, but I've found that it's knowing exactly how to go about those changes that makes a difference**." In this way, you're addressing any of their objections before they even raise them.

Start by discussing the benefits and how this program is going to help them. Focus on the areas they mentioned wanting help with, so it's relevant to their struggles. "**If we were to work together, we would start by focusing on [insert their primary health concern]. I will guide you step-by-step with specific foods to add into your diet.**" You'll continue to outline the areas you will focus on with them and describing your approach. (Don't go into the details of exactly what recommendations you will make during the program.)

Once you've covered the benefits, describe the features of your program – "**the way the program is structured is….**" Explain how long the program is, how many calls they get with you, and any other features included in the program. With each feature, explain how that feature will support them. For example, you might share that you're going to give them quick and easy recipes so they can make healthy meals that taste great and give them more energy.

Finally, you'll say "**the investment for this program is….**" If there's more than one payment option, such as a full-payment and monthly payment, share that information at this point in the conversation.

After you go through this information, leave some space for them to respond. If they don't say anything after a few moments, ask "**what are your thoughts**"?

At this point, they will share if they're ready to move forward. They may also have questions for you. If they don't ask any questions, I suggest asking if they have any questions. Their questions may actually be concerns they have. By getting them to voice their concerns, you have an opportunity to appease their fears and leave them feeling confident about working with you.

I love working with action-takers, so I like to give people an incentive to make a decision quickly. I used to think this was too salesy, but I experienced it as a client and I thought it was pretty cool to get a discount or extra bonus. Plus, it helped me to move forward and make a decision that was right for me. I've found that I don't feel or sound salesy when I deliver it with pure intentions.

If the potential client seems interested in working with me, I usually say something like, **"I love working with people who are ready to take action, so, if you sign up by [insert date – usually a week later], you'll receive [insert discount or special bonus]. If you need more time to decide, that's totally fine, no pressure. But if you do sign up by [insert date], I'll be excited to give you [insert incentive]."**

What to offer as a bonus/incentive: This could be a discount, though I usually choose a bonus. Think about what your ideal clients would get excited about. Here are some ideas: private cooking class with you, massage, or a collection of your favorite cookbooks. Experiment with a discount vs. other bonuses and see what people respond to and what feels right to you. If you decide to offer a discount, you'll want to increase your pricing so that the discounted price is still fair payment for your services!

When you get to the end, people will either say "yes, I want to do this" or they may say, "I need to think about it," or "I need to speak with my husband."

In my experience as a health coach, when people didn't sign up on the spot, it seemed impossible to re-engage them. I'd email them the following week to check in, but the vast majority of the time, I never heard back.

Wow did that hurt my ego and my confidence!

Then I discovered a simple way to turn this around.

It's called the "check-in call" and it's super easy. You're going to love this.

If, at the end of a session, a client said they "needed to think about," here's how I responded:

> *"Great – definitely think about what we discussed and what would work well for you. Let's schedule a time to check-in by phone for 10 minutes once you've had time to think about this. When would be a good time for us to check in?"*

They would look in their calendar and we'd pick a specific date and time and I'd ask them at what phone # I should call them. (Note: for some clients the check-in call would happen a day or two later. For others, it was a week or two later. I always let them share when they wanted to re-connect.) Try to make sure you schedule the check-in call at least the day before the special incentive expires.

During the check in call, you'll be able to answer any questions (and concerns) they have about working together and they will be able to make a fully-informed decision.

Sometimes people will sign up and sometimes they won't. And, occasionally, you'll have people email you before the check-in call to share that they have thought things over and that they aren't going to move forward with working together. While it's disappointing when a potential client decides not to work with us, it feels good to "close the loop" so you're not left wondering.

Why the "check in call" script & strategy works so well:

- You're not asking them if they want to have a check-in call with you. You're sharing that this is the next step, by saying *"Let's schedule a time to check-in…"*
- You're scheduling the check-in call DURING the initial consultation, by saying, *"When would be a good time?"*
- Sometimes, people don't sign-up to work with us because they have concerns or fears that they don't disclose. During the check-in call, you're able to address those head-on.

I still use the check-in call strategy in my business and it feels very natural and easy. I hope you'll try this on and see how it works for you.

How to use these calls to help you write powerful marketing copy

One thing I love about having calls with prospective clients is that the information you hear can be used as market research. Take notes while you're on the calls. Notice themes that come up and the specific word choices people make when sharing what they're experiencing. Then be sure to use this information on your website and in any marketing you do. You can even use what comes up as topics for blog posts.

I'm here to support you with this!

As always, post any questions you have about the initial consultation. Then, try out this process and let me know how it goes on the Facebook Group! If you're finding things aren't going smoothly, let me know and we can get to the bottom of it!