Enroll New Clients

ENROLL NEW CLIENTS & MANAGE COACHING SESSIONS WITH EASE

Budding
HEALTH COACHES

In a perfect world, your coaching practice would look like this: You have a waiting list neither too sparse nor uncomfortably large. Clients progress through your coaching funnel at a smooth, easy pace, graduating to other options or new levels as those in line at the head of your waiting list step smoothly through your door to take their place.

Your clients begin achieving measurable, visible success. They are excited at their progress and start singing your praises without you even having to ask for testimonials. Your reputation grows and so does your income, until it too is maintaining a steady, regular flow.

The good news is: It's not a reflection of your coaching skills if your practice doesn't yet look like this. Usually, it's simply a result of not following a reliable system. When you allow clients to turn up on your doorstep in haphazard fashion, and you start behaving reactively, focusing on those who yell the loudest, pretty soon you find yourself accidentally giving scant attention to your quiet clients. Nobody's happy; your waiting list resembles a log jam blocking up a river; and periodically it bursts apart as people jump out of your stream and go find other coaches.

Not pretty.

There are many strategies and approaches you could use. Not all strategies are right for your client, and some are not right for you, but today we are going to discuss some steps that you can apply to any coaching mode or method to create a seamless, reputation-boosting practice. **Make sure you always put these steps to use**, and watch your business flow magically begin to increase.

Step One: Prequalify your Free Strategy Session Callers

Every coach is familiar with the “free consultation” model—but there is definitely a wrong way and a right way to set this up.

- **Do it right**, and you will acquire a client who will recommend you and remain loyal to you—and grateful—for life.
- **Do it the wrong way**, and you will end up with clients walking away at the end of your free session, never to return.

Let’s look at some common scenarios that can happen if you create your strategy sessions, free consultations or whatever you want to call them the wrong way. (Worse-case scenario—when more than one of the following sale-killers occur.)

Believe it or not, some of these sale-killers occur because your free caller walks away happy! A perfect case in point…

1. **You did too complete a coaching job**.

   She doesn’t need your services for another six months since she got everything needed during the call. And do you know what happens during that six months? Yes. She forgets you, and moves on.

2. **You generously overstep your own boundaries.**

   This can happen when you are so caught up with helping your caller, you allow the call to run longer than the promised time. This is like nectar to needy clients who aren’t quite ready for actual coaching—and will leave your ideal callers with the impression that you are unprofessional and don’t

respect your own time. Either way, you'll end up with the wrong client.

3. **You were too generic in your targeting.**

   Let's use a hypothetical example: She signed up thinking she was getting one thing, but got something completely different. This is because she wasn't clear on what you were offering.

4. **You didn't let her know what to expect.**

   Many people, in all good faith, sign up for a free coaching session not realizing that they are expected to invest financially in coaching from you if you liked the session. These people are simply looking for immediate help: In which case, pressure to sign up for a coaching package at the end of the call leaves them either surprised and embarrassed, or surprised and resentful.

   Either way, this type of free caller leaves feeling let down. They won't be back.

5. **You hedged or avoided all mention of fees,**

   …till the very end of the call. Many coaches don't mention fees until they are actually closing the sale; either because they assume the free caller has the smarts to check out their website and look at packages available ahead of time or because talking about fees is "uncomfortable".

   But if talking about fees seems uncomfortable on your landing page or at the beginning of the call, it's going to feel twenty times more uncomfortable when you spring a costly decision on your caller at the end of the call.

6. **You didn't make your free caller work for the call.**

   Many successful coaches take one extra step when prequalifying or disqualifying callers. They ask the potential caller to provide details about

what they want from the call, what their issue is and why they think they might be a good fit with that coach.

You can do this either by providing a form, or by asking your potential caller to email you—sort of a “write me a mini-essay” command. Yes. This will put many people off—but if it does, chances are they really weren’t ready for coaching anyway. When you let them just book your time without working for the privilege, more often than not it turns into a call that leads nowhere.

These are just some of the pitfalls you can plummet into if you don’t follow a finely-tuned client attraction system.

That is why it’s important to **pre-qualify takers for your free strategy sessions**. You need to gear these sessions—and your landing page—to attract people who:

- Need your precise area of expertise—and approach
- Understand the nature of coaching
- Are ready and able to invest financially in coaching

You can take specific steps to make sure you effectively tick off these three crucial boxes.

Step Two: Educate Your Visitors about Coaching

It’s not enough to tell your visitors what you do: Tell them what coaching is—and isn’t—too. You can do this very easily with what I call “is or isn’t” scenarios.

That’s when you include a simple text box or segment—one line or paragraph is more than adequate—saying what something is and what it isn’t.

Step Three: Show them the Proof

Very simply, make sure you not only include a “Client Success” section on your website, **include excerpts of these success stories right within your free strategy session landing page**.

In both your success section and your landing pages, don’t overwhelm visitors with heavy text. Two or three potent sentences per client can say more about your coaching effectiveness than an entire life history or page of description.

When using longer testimonials, break them up with:

- White space
- Paragraphs
- Graphics
- Johnson boxes (that’s where text and pictures are enclosed in a bordered text box, like an ad)

Ask your clients for a profile photo you can use with their testimonials, as well as a link to their websites.

Another reason for avoid heavy, text-only testimonials: They tend to bore **people who are using mobiles** in order to scan your site. Mobile users scan much more heavily than PC users for readability before committing to stop and read. Unless something really leaps off a page, it doesn’t even register—and they’re gone.

Graphics, photographs and white space all help testimonials stand out and catch attention.

What Not to Do:

If you want powerful, personalized and sincere testimonials, don't just ask your client for one and stop there or leave the ball in their court: Many people find writing testimonials difficult because they don't know where to start. So what happens? Yes, that's right. They put off writing that testimonial!

What to Do:

Help your client out by providing prompts she can use to trigger ideas and make testimonial writing easy.

For example, ask leading questions such as:

- "What is the biggest accomplishment we have tackled and achieved together in the last six months?"
- "What would you say is the thorniest problem we have tackled together—and why was our solution the right one for you?"
- "What do you like most about our coaching sessions?"
- "If you could sum up my coaching in one sentence, what would you say? In three sentences?"

Remember—**make the process easy** for your current or past clients! Let them use whatever medium they feel comfortable with: Audio, video or text. Don't require them to write an essay. Help them to get to the point.

Help them to say what they're most excited about in **your coaching** and **the results you helped them achieve**.

Step Four: Make it a Two-Way Street

When you present client testimonials, remember it is never really about you—even when clients are praising you. It is about that potential client who is sitting there, reading your client's testimonial, and asking herself:

- "What can this coach do for me?" (Can she do that for me?)

She will always answer her own question—for or against your services—through seeing things like the following:

- If she identifies with those giving the testimonials
- How she views you and how much she enjoys your style
- Whether or not they achieved their goal—and measurable results

And other keywords she is looking for. For one person, that keyword might be "easy". For another, what they are looking for is the word "action" or even "statistics"—or whatever word "speaks" to them on a resonant, emotional level.

Visitors will look for clues in what others say, and you can control what appears in testimonials so that you attract only the right client.

For example, if you have a warm and friendly style, select testimonial sentences or paragraphs that include warm and friendly keywords. If you are all about the action, on the other hand, and you want Type A, driven clients, choose keywords that reflect the qualities Type A, driven clients respect.

It is a good thing when potential clients are repelled by something about you and your coaching style that they are not compatible with: It saves you both time,

money and heartache—and leaves you free to focus on the perfect clients you do attract.

One final word on the topic of client success stories…

Show off your Clients!

Don't just call your testimonials "testimonials"—call them something like "Client Success Stories." Introduce each client and explain why you are proud of them before displaying their comments. And feature your clients in your blog, whenever you can do so in a relevant manner.

If you want them to be proud of having you as a coach, remember to reciprocate: Be proud of your clients.

Do that sincerely, and visitors checking out your site will want to be there among your successes too.

Step Five: Close the Sale Gracefully and Easily

We have already touched on the best way to close a sale and get your free caller to sign up for coaching: And that is by **being transparent ahead of time**.

Such as…

- **Being up front about your expectations**: Namely, pointing out that people are asked to sign up at the end of the session, if they feel you are a good fit with their goals and personalities.
- **Being up front about your fees** and actually requesting that they go check

out your programs and packages first before signing up for a free session.

- **Prequalifying—and disqualifying—the right and wrong potential clients** by deliberately using certain keywords, phrases and pacing in your content.
- **Providing knock-'em-dead client success stories** that are:
    - Provable
    - Measureable
    - Achievable
    - Easy to read, listen to; or view

Plan and execute all these actions and you will find yourself automatically set up to close the sale before you ever get to your closing speech. In fact, it shouldn't be a question of "*will* you hire me as a coach"; it should be more a question of "which package is right for you—A or B?"

(In fact, it's worth noting that in sales cultures, it's a given that you do your best to avoid open-ended questions that could lead to a negative answer. Instead, salesmen are taught to always provide a customer with two "closed" choices.

And you can use that technique, incidentally, on your kids! Don't ask: "Do you want vegetables?" That's just inviting a "no". Instead, try giving them two definite alternatives: "Do you want zucchini or broccoli?" They will be so busy deciding which one they hate most, they are less likely to say no!)

When you pre-qualify your visitor every step of the way, you increase your chances of finding yourself with a committed, paying, happy client at the end of your free strategy session. But don't stop there: Also make sure you institute something else we talked about—and that is, creating a specific agenda for your free strategy

session and focusing only on one specific, solvable issue rather than going off into free-form, full coaching mode.

By focusing on solving one specific aspect of a problem they are having and opening the door to what is possible, you position yourself perfectly so they experience you actually providing the help they need.

Your call should leave them asking, “Where do I sign up?” Not, “Should I sign up?”

But there is still one more action you can take to increase conversions even more. It is not for every coach but it is worth considering—especially if you have a waiting list and you’ve already proven yourself as a coach.

Step Six: Systematize your Sessions

Just as we’ve talked about setting up your strategy sessions to turn them into a maximum-conversion system, so you should think about systematizing your actual regular appointment handling.

Every step in your appointment process should be well thought out ahead of time, so that all possible potential glitches or omissions are eliminated. For example, are you going to send **email reminders** to clients about appointments and free strategy sessions? Do you want to **take payments online**? How are you going to set this up?

If you use a self-scheduler like Clickbook.net, it is important to **double-check that it has all the features you want**. For example, Clickbook.net automatically sends appointment reminders; Time Trade does not. Clickbook.net also allows clients to pay when setting up appointments.

So why do so many coaches prefer Time Trade? Simple, cost. $49 per year for Time Trade versus $19.95 per month with Clickbook.net—yet you can more than earn back that entire $239.40 annual Clickbook.net fee with one extra client who loves the convenience of self-scheduling and easy payment.

The takeaway here lies in realizing the importance of getting your system down in writing and making sure that not only you, but also staff members follow this system, step by step. When a system is repeated and becomes habit, mistakes and oversights are eliminated and flow is smooth. There are no bottlenecks because someone forgot to remind Client "A", or a payment was missed. And you don't have the awkwardness of having to remind your client to pay, when she becomes used to it being part of the booking process.

Smooth appointment flow generates happy clients and helps build trust. It fulfills rule number one—make it easy for clients to stick with you!

Other appointment functions you should think of systematizing: What about **providing your client with a recording**?

Here's a tip: Keep the recording a secret until your client is online for your first free strategy session; then tell her she will receive a recording of the call. Ninety-nine percent of the time, clients love the idea of being able to refer back to a recording. And if you get the odd one who doesn't want one, you can reassure her that you won't press the "Record" button.

Recording your calls also allows you to refer back to them prior to the next session, if you need to clarify something to yourself or check on the actions your client was supposed to take. This makes you look like superwoman, with total recall and a deep interest in your client's issues.

If you set up your calls through a service like FreeConferenceCall.com, you can easily set up recordings, as well as provide toll-free call numbers to both U.S. and international clients.

And don't stop there: Decide on other perks and aids you can include as part of your coaching packages.

For example:

- Worksheets
- Templates
- Checklists
- Online programs, calculators, etc.

Step Seven: Provide a Follow-up Routine

Both with your free strategy sessions and regular sessions, don't just let the client walk out of the appointment and then forget about her till the next one. Create a follow-up system that:

- Reinforces what you spoke about and decided on
- Reassures her that you are important to her
- Reminds her to take agreed-on actions

That's where having emails set up in your Autoresponder comes in handy. **Use templates** to help follow up become an easy habit for you too—or to help your staff be consistent with your style and values.

Celebrate achievements with your clients. Give them shout-outs in social media or on your blog—after first making sure this is acceptable. (Some clients aren't comfortable with sharing the fact that they are being coached, for various reasons; and it doesn't matter whether or not you appreciate those reasons—what does matter is respecting client confidentiality.)

And that's another point we'll bring up quickly. Many coaches make it a point to ask client for a few words of testimonial right on the first free call. There's nothing wrong with doing that, but you might want to carefully consider avoiding this popular strategy for a couple of very valid reasons.

1. Never ask a client if you can quote them, testimonial-fashion, if they have made a point of actually mentioning that what they are telling you is highly confidential. Even if you don't mean to force them to bring up the confidential stuff, you run a real risk of weakening their trust if suddenly you're pushing them to acknowledge you publicly
2. A testimonial given after a client has achieved a specific result is always much more effective than one given after a free call, where you have recommended an action but the client hasn't yet had a chance to take it

Pushing a client for a testimonial too soon can make them feel you were only interested in getting that recommendation. And if they haven't yet experienced a success as a result of your coaching, any recommendation will not be whole-hearted, genuine and sincere.

So what can you do, when it's important to get those first few testimonials on your landing page or site? You can make soliciting a testimonial part of your follow-up procedure. That way, it will not only feel more natural and less "pushy"—both to you and your client—it will actually **be** more natural and less "pushy"!

Don't ask for a testimonial: Look for **opportunities** instead. Make it a habit to read her feedback and identify opportunities to ask if you can quote a specific sentence (or the whole letter, if you feel your client is totally comfortable with you and they've just shared a story potential clients will relate to).

Be sensitive. Look for "red flags" like "I've never told anyone this before" or "I find it hard to talk about…" and resist the urge to ask if you can share these tender spots.

On the other hand, if a client is really happy about completing an action, getting a reward of some sort or achieving a goal—that's the perfect time to ask if you can share that. You are both celebrating together, and it will feel like that.

Push your client too soon, and she will feel like you are "just using" her. Even if she understands it's part of the whole free strategy scenario, it will still weaken trust.

Step Eight: Ask for Referrals

A referral is different from a testimonial. A referral is what happens when a client thanks you and you seize the opportunity to say, "Thank you. That's great to hear. I love helping clients with [whatever it is you do]. In fact, if you know anyone else who needs [whatever it is you do], please tell them about me."

Step Nine: Keep the Ball Rolling

So your client has six fantastic sessions with you, and she "graduates." She's successful—and gone. Right?

Wrong!

You can do it this way, of course, and you will still have exceeded your mission: To help your client solve the problems you specialize in dealing with, and achieve certain successes.

But that is a short-sighted way to approach it, because you're not only missing an opportunity to retain their business, you are missing an opportunity to stay in touch and keep them as a successful, permanent testament to your coaching skills.

When clients graduate, give them a way to keep in touch. And if you can generate extra income from it, so much the better—your successful client at that point will be only too happy to pay you.

Create resources for your successful clients, such as:

- V.I.P Days
- Mastermind retreats
- Exclusive membership groups, where they can meet your other successful clients and network with them—and where she has full access to your awesome resources and programs. (TIP: This can be an UPGRADE in a tiered system)
- Software exclusive to her needs

Even a simple Facebook Group can create a community and keep your clients emotionally loyal and connected to you—and to each other.

Plus your Facebook Group or exclusive membership site takes the load off your back: You'll find your most proactive members will automatically and naturally answer questions for you when you're not around, and help those coming up through the ranks.

Group interaction provides more opportunities for referrals and testimonials.

Only you know the best system for your coaching practice, but I hope these steps have given you something to think about; maybe even a couple of surprise tips you're eager to put into practice.

Let me leave you with these thoughts:

- What could you do better that you're not doing now?
- Do you know where the leaks are in your client sign up and retention system?
- As we were talking, did you realize there were areas you were neglecting?
- Are you excited about streamlining your system and attracting exactly the right type of client?
- Are you excited about making your business feel easier—and more fun again?

For further support (and lots of fun) — join us in my private Facebook group of over 500+ close-knit coaches. See you there! *xx Jamie*