



- 1) Purpose of a consultation call (choose the name of your call wisely as it will automatically consciously or subconsciously set the tone of the call)
 - a) Get to know the client (do I want to work with this client -it's not always a yes)
 - b) If desired, offer your services (if you charge for consultations have a tangible takeaway)
- 2) Prepare for call
 - a) List of services and prices
 - b) Client research (make sure you have questions, see if you can find out how they get paid and their rates)
- 3) Outline of call
 - a) Sometimes the client asks you about your value and expertise. (I actually end with this because studies have shown what you end with is what the person remembers. Plus, I always like to start with the client and really make the call about them.)
 - b) Client's great struggle or challenge and the impact
 - c) Create the vision of what you can do for the client
 - d) Technical questions
 - i) Website - Wordpress, Square, Wix?
 - ii) Email service provider - mailchimp, AC, ConvertKit
 - iii) Hosting provider - Hostgator, Godaddy, etc
 - iv) Funnels - Clickfunnels, Leadpages, etc
 - v) # of contacts/lists
 - vi) Ask for login to see how things are set up
 - vii) Have other team members?
 - e) Present your offer and their investment (include a confident solution of why you believe you will be successful)
 - i) If you aren't ready to provide a proposal/quote due to the clients' needs, then follow up with an email within 24 hours of the call
 - ii) Depending on the platforms they use, may not want to help them.
 - f) Respond to any objections and questions (I would do this before I present my offerings because then I can end with no objections)
 - g) Next call to action (I present the offer and say nothing. Either they buy another package immediately or we have a set time to speak before we get off the phone.)
 - i) Follow up with an email
- 4) Lesson learned
 - a) Closing rate?
 - b) Ask potential client why you weren't selected