Strategy Session

Module 9

Trevor: Welcome to Module 9, where we're going to talk about the Strategy Session. This makes all the magic happen. This whole Clients - On - Demand system has been trying to build up to this one thing. For you to have a very quality conversation to bring as much value as humanly possible to people that you can help. You've streamlined up until this point. You've got clear about your list. You've had fun to go ahead and set these appointments and had the discipline to follow through and actually take the action, so that you now have someone who really wants to work with you. In fact, they paid you for the privilege. It's now up to you to give them permission.

A lot of time in the ‘sales part’ people are all freaking out and they're thinking that now is their time, that they have to go ahead and pitch. That is the opposite of what we're doing here. This is not about all the stuff you've got to say. This is about asking the right questions. You'll notice that pattern. From the very first connection call, to the ten minute call, to the discovery call, everything is part of a step by step system of asking questions to discover your match. We go into much more detail in this in a variety of different ways.

I wrote my first book on this, *High Paying Clients*. I go over every single detail. All the nuances of how do you have this strategy session. Now, in this module, I don't think you want me to read you this whole book. I think it's a 150+ pages. You don't want to read that book right now. You don't want me to do that to you. I'm going to give you, really, the understanding of the most important parts. If you want more you can get some of our bonuses. I know that Robyn is going to come up here in a little bit. She's going to talk about a couple of the other things we've giving you to help you with this Strategy Session.

Know that it is a system and a process. One of the products that I have, and I'm not sure if you've bought it or not yet, is called the Holy Grail of Sales. It's where I teach this in a live training. I go on for an hour. We do some role playing back and forth. Robyn actually does it with someone in the audience. It's a phenomenal product, if you haven't gotten it yet. Mastering this will set you free. One of the reasons we call it the Holy Grail of Sales is the first time my wife and I actually used this, we added an extra $300,000 to our business by using this checklist and system. Pretty amazing. I can't wait to share with you some of the most important parts.

Now, this is my checklist. This is my system and process that I go ahead and go through and we cover in the book. This is … By the way these are our books that actually cover a lot of this. Steve Napolitan's brand new #1 best selling book (in 4 countries) is *Capture Clients, Close Deals*. He talks a lot about how you don't chase clients, but you're trying to find the right ones; which we've been talking about this whole program.

Now I have a course. You can buy that product like I mentioned. Steve has a three day program that's focused all … Most of it is focused right here on this strategy session as well. My wife will go ahead and tell you about hers as well. This is my wife's book. This is called Mind Over Money Management. Again, it's #1 bestselling book. These are strategies your Financial Advisor won't give you. One of the reasons why I'm holding up these books right now is not to just brag. Although, I think it's kind of cool. It's to go ahead and share with you how we use these book as some of the ways that we've got more of these phone calls to generate more leads to go ahead and get more strategy sessions. It was the strategy session that helped set all of us free. Robyn did you want to add something?

Robyn: Yeah. I just want to add something in regards to the importance of the strategy session. Everything leading up to this, the ten minute call, the discovery call, the strategy session, if you notice there's some themes in all of these. Some people say, "Well what's the difference between the discovery call, the strategy session, the ten minute call?" The thing is they're all very similar because of what you're getting to. You're digging to really, what's the problem? What's holding them back from getting what they want? Why do you want to know that? Not just to close them. Not just to help them. You want to know that because now you know how to help them. If you don't know the problems that you're solving, first of all, you don't know how to communicate to your potential clients. You also don't know how to solve that problem.

The reason I bring that up … He just said my book, and I just wanted to mention that. As a financial planner, I really was trying to solve people's problems by giving them a box. Here's a box. The box is a service or a life insurance product. A product or a service. Something that I was thinking, "Oh, here's the solution." It's because I didn't really understand the problem. When I really started asking these questions using the ten minute call, the discover call, the strategy session, these sort of things, I really understood the problem. I understood what they wanted. Then I was able to develop a system. The whole system is in here only because I uncovered it within this strategy session. It's so important.

Steve talks a lot about, in his book, surveying your clients. Any time I have a potential client I'm really surveying them because I actually get to know what their problems are. I get to know what they want. Then I get to know how I can help them. Then I just start putting that into my marketing. I created programs based on all that stuff.

That's how we get them the results. That's so important I just wanted to add that.

Trevor: Thank you. Thank you, honey. It's this strategy session, and figuring out how to give people permission to buy from you. They've already scheduled the time. You cracked open their credit card. They made a small payment, $500, $1000, $250, whatever your fee is for this strategy session. Again, rename it. Rename it what you want to name it so that it seems appropriate for you and your business.

It's this that will set us free. Notice this. It's a system. I mentioned this at the very beginning when we introduced the product. A recipe is something that you can follow again, and again, and again. If you have a system, a checklist that you go through one time after the other, it's just going to serve you to the Nth degree. The most important thing is that you actually are using a system. You can use our system. You can use my system, you can use Robyn's, you can use Steve Napolitan's. They're all the same process of asking questions to make sure you add as much value as possible and give people permission to buy from you. As one of the bonuses in this program, we're actually giving you all the benchmark questions, or some of the key questions that you're going to want to ask during this conversation. At a bare minimum, you want these things.

If you want to master the strategy session, you can go ahead and get one of our books or you can attend one of our programs. I just talked about the Holy Grail of Sales. Steve's course is called Discovering A Match. That's a three day event. Robyn's course is actually called Advanced Sales Mastery. We'll have that in a new product form as well. There's a lot of ways that we can help you. That's not the purpose of today's, module to tell you everything about this strategy session. It's making sure that you know you're using a system.

Robyn can you come talk about the bonuses and what the benchmark questions are actually going to be. These are the things you want to make sure you take, that bonus, and put them into your system and process.

Robyn: Yeah. What you're going to get as one of the bonuses is the FCC sales system. I talk about that in the discovery call. Then it's also, by the way, a skeleton of this that you can still use. It's not like you don't have anything. You've got the FCC sales system. Also in that you'll get the three key benchmark questions. I go over each one of these, why it's important, how you ask the questions. I'll give you one right now then you can just look at your sheet. One of them is called 'decision maker'. The question is: 'Assuming we're to work together in some capacity. Are you the decision maker?' Steve calls it something else, we call it this. It doesn't really matter. You want to get a, "Yes," for that. You want to make sure you don't do this whole process and find out at the end that they're like, "Oh, let me check with my husband." Why do you get a maybe at the end of a session? It's because they're using an excuse. If you give them the opportunity to use an excuse or objection, they're going to use it to think about it.

These benchmark questions are going to help you get from that, "Maybe. I'm not sure. Let me think about it. Let me ask my spouse." To a "Yes." That's what you want because so many people go chasing, chasing, chasing, when they don't master this. Then they went all this way to get here to get a, "Maybe." I'd rather a, "No," then a, "Maybe." At least if you get a, "No," you can still get a referral.

Trevor: We're going to give you these bonuses and some other cool stuff. The key is that you're using that system. The benchmark question that she just gave you about decision maker is written in this book.

We all have it. Steve, Robyn, and I use it in our process and system every single time. I recommend that you write these things out. Remember I talk about the power of your script. Then it's okay for you to read them even if you're standing face to face with someone. A lot of this we're making sales on the phone when we're talking to someone, but this might also be that you meet someone face to face. It's okay to use a checklist, and it's okay to read it off.

"Assuming we were to work together, are you the only decision maker, or is there someone else you make decisions with?" Don't be afraid of using the checklist. Aligning with someone. Show them, there's nothing here on your checklist that you should be concerned about. This is your processing system to add as much value as possible. You're going to keep to asking these key questions to move them through the stages.

One last thing before we move on because we're right at the tail end of this program. We're not done yet. We've got one more module. That is, at the end of this session, you are going to go ahead and get a decision. You want to collect a decision here at this strategy session. You might get a, "Yes." You might get a, "No." What you want to hide from are those, "Maybes." That is something that is not appropriate for you. You want to fight. You want to fight to make sure you don't get one. Collect a decision. If your decision … If they're not ready to buy now, if you can't get them as a client … Remember the stages of the sale? That top one is after the strategy session, you get a client. If they're not ready yet … Remember I also broke things down and they're really simple. Your business is about setting appointments. What was the other one?

Robyn: Keeping them.

Trevor: Keeping appointments. There's something really key here you've got to remember this. It's called **BAMFAM**. Have we covered this before?

Robyn: I don't think so.

Trevor: Oh my gosh. This is so key. You need to have this down. This is **BAMFAM**. This is **B**ook **A** **M**eeting, **F**rom **A** **M**eeting. If at the end of your conversation they're not ready to buy, that's okay. If you still want them to be your client, you need to set that next appointment. As a rule of thumb, this is a language we use internally with our clients all the time. You want to BAMFAM them after every single point of contact. During this especially. If it's not the time right now, you set the next strategy session, or appointment, or time that you're going to follow up. This is really key. Book a meeting, from a meeting. Then you'll set up another time, set up another time.

Now, it may be that the next meeting from here might just be a ten minute check in call six months from now because now is not the right time for them. It just depends. I will share with you that I went through the first stages of this sales process where I reached out and did the connection call. I went and did the ten minute call. I did the discover call. I had this woman, her name is Jen, she told me … This was maybe 18 months ago. She said, "Yes, Trevor. I want your help." Then for some reason on the discovery call she pulled back. I wasn't even able to schedule the strategy session. She sometimes would schedule it and not make it.

Now, this is a woman that I have a lot of respect for. I really like. She's one of my perfect, ideal clients. That was okay with me. My job is to just go from one step to the other. We got a hiccup where she wouldn't go from this step to the next step. I went ahead and we … She wouldn't show up for her next appointment, or she would choose not to move forward and that was okay. I would book a meeting, from a meeting. Sometimes this would happen and I'm not actually talking to her. She does not show up. We have an appointment, she wouldn't show up for whatever personal or professional reasons. It's not relevant. I still wanted her as a client. What I did in that moment when she didn't show up, is I scheduled my next appointment with her. On my own I decided when I was going to follow up with her. I put her in my calendar and decided I'm going to call her in a month. I'm going to call her in six months. Now I have this list of follow ups. Not everybody wants to buy your stuff right now or even has the time to have a call with you.

The really cool thing about this is that she became a client just recently. For one of my 1-on-1 clients, it pays me a healthy sum of money because she truly did want my help, it just wasn't the right time. I had to have the discipline of booking a meeting, from a meeting. Making sure I follow up. Did you catch what I just said there? If you're not making the sale for any reason, set that next appointment. If they won't set it with you and it's not appropriate or you can't get them on the phone, that's okay. You can still schedule it on your own mind, on your own calendar and then follow up. This is key. This client is worth somewhere between $30,000 and $100,000 to me. Just to let you know. A little bit of follow up every once in awhile to just connect, another connection call, made all the difference.

I hope this has been valuable to you so far. We are not done yet. Robyn, Steve, and I are going to share with you session number 10, Module 10. You're almost there. We'll see you on the next video.