On Selling High End Packages for Coaches

A Conversation Between Tad Hargrave and Greg Faxon

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Tad: Greetings, everybody. It's Tad Hargrave from Marketing for Hippies. It is March 6th, 2017 and I'm here with Greg Faxon where we're talking about this dynamic that a lot of coaches encounter when they start thinking about and actually start offering higher end packages. And the trouble that comes from that.

So I'll set the stage maybe a little bit about why this topic was of such interest to me and I think also Greg. So there are three things to me that matter in marketing, three things I have to have in order. Relevance, credibility and value. Those are three things that have to be established. And relevance really comes from this whole conversation about niching, you know.

And if you follow my work for a while, you know that's something I focus on a lot. There's the website NichingSpiral.com that focuses all about that. Because if there's not a fundamental fit there in terms of they're in the kind of group of people you're trying to help, or you're offering the kind of thing they want to buy, there's no relevance, so why would they pay attention? So that's the first thing that has to be established if it's there to be established.

The second thing is credibility, and credibility meaning I trust you, I like you. There's a lot of things that come into play, but certainly point of view and perspective come into play here. But you know, the relevance piece, basically you're saying, "Hey, I've got something you'd like to buy." I sell Spanish Galleons and I know you're in the market for that kind of a boat. So that would be relevant. But also the journey can be relevant for most service providers, which is what we're talking about.

You're not just selling them a boat, but you're selling them a particular journey from island A to island B, from some problem to some result. You know, you were scared to make cold calls. Now you feel okay making cold calls. You feel totally unsure how to get over or deal with some heartbreak, and on the other side you're in a different, better place with it.

So that's the relevance piece. Credibility would just be like, "I trust that you can get me from my island A to island B. Or I trust your craftsmanship of Spanish Galleons." And then the value piece, the final piece is what's the offer, you know? And is the offer good? It's a return on investment piece. If I spend this much money, what do I get in return?

So those three things all need to be established. And what I've been finding is lately it's interesting the timing of this call. Because in the last few months I've been doing a lot of one-on-one sessions. And one of the things that's come up a lot in these sessions — of course these clients of mine, they're mostly service providers. And the whole business model they have is they just offer one session and then another session and then another session and they charge you, you know, whatever is pretty typical for industry rates.

You know, somewhere from $75-150, somewhere in there for most of them for a session. And that's the problem, is everything we're doing is just one at a time. So I'll do one session and then the other session. Maybe I'll have you on to do another session, and that's a very difficult business model to do because you have to deal with that awkward conversation every time. And oftentimes a lot of people won't ask because they feel so awkward so they don't want to ask again to book another session.

And so the business model becomes basically hope. I hope the people are going to come back for another session. And the other challenge with this is that it's hard to get any sense of momentum here. It often ends up being a freestyle sort of thing too, because it's not really packaged for a particular niche. It's just well, I have this boat and I can sail you anywhere. You know, I'm a life coach and I can help you out with any problem you have in your life.

I'm a holistic practitioner and I can help you with anything. You get the idea. So I've been encouraging a lot of my clients to come up with a package. Meaning like what's a way you could put together some services and products or different things that would be kind of a one-stop solution for your clients around a particular issue? And the interesting thing is people who felt so weird about marketing, as soon as they come up with a package they're really excited about, it's like their energy gets unleashed.

This one lady on the east coast, she had fibromyalgia. And you know, it just was terrible for years. And then she discovered Agravata, and it completely changed the game for her. And she was struggling with a niche. I said, "Well, how about people with fibromyalgia through Agravata?" She goes, "Oh, of course."

Then I was like, "You know, instead of just offering a single session, what if you were to create a real package?" You know, we actually started talking about a box she could send people that would have certain oils and certain herbs in it, a book, a CD, a DVD. All these things that she could include that she could actually mail people as like a welcome to this coaching program with me. And of course there would be multiple sessions.

So when she hung up by the phone she was just so lit up by the whole thing and the challenge with this is that as soon as people start to do that, of course that's going to cost a lot more. And it's good to know there's kind of two ways to package. One is like, "Hey, you can get this many sessions with me." The other one is a package that may be more focused on an issue. So the first kind of package focuses on the boat of your modality. The other one is to focus on the journey that you're taking people on. And that first one, if you say, "Hey, sign up for 10 sessions," that's often with a, "Hey, pay for nine, get 10." That kind of a deal so they're getting a discount.

Whereas the other kind of package when you focus on a particular journey or issue, you can often charge more because it's actually tailored to something specific that's real and tangible and useful for people. But of course now we're talking about charging more money. That is immensely confronting for a lot of coaches. Because they say, "Oh my God, I've never asked for that much money before. I don't know how to do it."

And so it's very tricky. And so this is a call where we're going to explore how do you navigate that kind of conversation. So with all that foundation laid as a sort of welcome mat, building a little palace of words of welcome, the great Greg Faxon is here. Welcome, Greg. Thank you for being here.

Greg: I think that's a great intro and I'm really glad you framed it in terms of value. Because a couple things I wanted to mention right off the bat if you're open to it. One is that we're having a conversation in a vacuum right now and I just want to call that out. We're talking about very specifically that enrolment conversation. How do you give yourself the highest probability of a yes from people who are a good fit for you?

Right, so I just want to put in the assumption to the call up front that when I say if you do it this way, that will give the person more of a chance to be a yes. I'm assuming that you've gone through your criteria and decided that you actually can serve them. So we'll probably come back to that a few times. But I just want to have that footnote when I always say that. Because the goal isn't to get everyone to a yes.

In fact, if you get the wrong people to a yes, it will be very counterproductive to your business. You won't get great results and your reputation will go down and then it becomes a downward spiral. So that's the first thing I want to mention. And the second thing I wanted to mention is I'm very glad you talked about value because right off the bat there's going to be a mindset piece here where if you're not aware that your pricing should be commensurate with your value, then I can give you the whole framework. We can talk about tactics and that's fine, but you won't be in a place during the call where you can execute on those tactics kind of with integrity.

In other words, the other person's going to tell that something's off. Human creatures, we see through the words as you all know as coaches. And so if it doesn't seem like you're good with what you're offering, nothing that we go over is going to be that helpful. Because in reality, if you're coming from a place where you believe in the value of the package that you're proposing, you can almost say anything. I mean, there's lots of different ways that conversation could go and get a yes if you're really dialed in.

And if you're not, you could almost say anything and have it not work.

Tad: Amen. So Greg, maybe we can start with — maybe I should let people know. So Greg had written a piece called 11 Reasons you Don't need a Niche and what to do instead, something like that. I read it and I thought it was really great. Because I think the way that so many people talk about niche is so constricted. And he really opened it up.

It's a popular article on the NichingSpiral website and I just really liked it. Some people reached out to him saying they had come across him on that article, which started some conversations. And so it's interesting, Greg, you're really focuses on this whole enrolment conversation piece, and how do you have this conversation about the higher end packages.

And I'm curious how you got to here. Like why this topic? Because it's not one that I've really focused on much. So I'm curious, why you? Why this topic?

Greg: Well I'm a little weird and I've always loved the processes of sales. And I'm just going to use sales and enrolment interchangeably today. Oftentimes Tad and I use enrolment because it's more palatable for the people that we serve. Because sometimes sales has a lot of — as you guys know, as soon as you hear it you're going to have a preconceived notion about that. Or it might feel a certain way. It might feel sleazy. But essentially we're talking about the point in the relationship where the client goes from not having paid you to having paid you in services or in transformation that they want.

And I've always loved that. I mean, even since we did yard sales when I was a kid and I would sell my favourite toys when I was done with them. And what I realized — it's funny, I learned this lesson because I was really good at selling at my yard sales because I was always selling toys and Lego sets and books that I had loved. In other words, I knew how good they were. I knew how much joy they brought.

And so I would just go after it. Not in a pushy way, but just really conveying the value that this stuff had whenever a kid would walk down the street or a mom would walk down the street or a dad to buy something. And I was selling my toys and I think I also realized as I got older and continued to use that skill of enrolment or persuasion in different contexts. Sales is where a lot of the magic happens in all different areas of our life, right?

I mean, there was an enrolment process when my fiancé became my fiancé, right? There was a whole way that relationship built. There were different points in the process where if we couldn't bridge that together, that would have been the end of that. It would have been on pause, that relationship. It couldn't have moved past that point. And so it might sound kind of odd to relate it to dating or relationships, but this is any relationship, like whether it's in coaching or not.

And so I think I just saw the power of that weave through different really important points in my life. And obviously when I became a coach — and I didn't start off working with coaches — and I became a coach, I was helping people find work they were passionate about and get on the path towards making money with that. Because that had been my journey you know a few steps back.

And I realized how critical it was. I remember tweaking my website, working on my logo and doing all this kind of what I call creative avoidance where it seems like you're busy, but you're not actually affect the bottom line of your business. You're kind of working on the periphery of what the business is. And I wasn't actually in conversations with potential clients, and that's when a more experienced coach called me out and said, "Hey, the only way you really make money as a coach is you're in conversation with people who would be a good fit to work with you."

And I ended up having you know, 50 conversations that month alongside a full-time job. And that's what transitioned me out. So I guess the bottom line is I just have seen the power of being good at enrolment, you can write your ticket in whatever business you'd like to.

Tad: Yeah, amen. And it is interesting because I know in this scene there can be — especially with my clients — words like sales are sort of confronting. And I guess I would just say to everyone, let's not be too precious about our language. I was at a workshop where I was talking about the sales funnel and they said, "No, call it this instead."

And I was like, "But what you're describing is the exact same thing." You're just putting this other language on it. What we're betting to here is that business happens in conversations and I agree with you. I've seen so many people do everything — there's a phrase in Gaelic which means everything but the needed thing. You know, they do everything except the thing that needs to happen.

So they'll post on Facebook. They'll spend all this time. People say, "Well, what should I do for a poster or brochure?" And I'll just ask, "Why do you want this little brochure? What's the point of it?" And eventually we get to, "Well, to get clients."

And I'm like, "Okay, so the goal is to get clients. Let's see if there might be a more direct way than putting all your brochures in all these cafes and new age book shops around town and hoping that people see them."

And you know, there's three roles in marketing in my mind. The first one is we've got to get their attention. The second on, we've got to establish if it's a fit. The third one, we've got to lower the risk of them taking the first step. As Greg started out saying, the whole thing is about fit. We're having that as an assumption walking in, that it's a fit between you and your client, on all the levels you could mean that.

Meaning the topic, you know that you're helping. The style, the point of view you have. There's some sort of fit. But what soaked through is that you could have somebody's attention. You could have there be a fit and yet there's this kind of wall of risk in between you and your client. And they don't buy. It just amazes me. Somebody could be like sitting in front of you and start resonating with everything you're saying. And they even might love the author is the thing.

"Oh, this is exactly what I need." And yet there's still some risk. And so people I think just need to have a conversation about it to see will this be worth it. And to get to maybe some of the finer details of like, "Okay, generically this seems to be a fit, but does this fit for me right now?" And I think we're so terrified of the conversation. I think part of it is because the orientation we've been taught in so much sales, or maybe we've heard in the reputation of sales, is the orientation is to get them to say yes.

And so the whole conversation it's like we're sitting there kind of trying to maneuver them. But if we engage in a conversation in a different way of like really seeing, is this a fit? You know, we can relax a bit, because we're actually not trying to convince them of anything. But one of the words that you used, Greg, was bridging. And I remember this from a blog post that you wrote.

And that word feels so important. I'm wondering if you could speak more, elaborate on what that means for you.

Greg: Sure, yeah. I'd love to talk about bridging. Actually one thing came up as you were talking that I'd love to mention first, which is the intention with which you enter the enrolment conversation. We've danced around a bit. But if you're listening to this now, go ahead and hopefully you have a piece of paper, or you could do it on your computer. Create a little spectrum. Right, so an arrow on one side, line, arrow on another side.

On the left side I want you to imagine or write please, all right. And then on the right side I want you to write or imagine sell. And in the middle I'd like you to put or imagine serve. And what I believe is the optimal intention to come into the enrolment call with is the intention to serve. You don't have the intention to sell yet, because we don't know if they're a fit. Hopefully we did some good filtering or some good qualification.

So it seems like there's a good probability, but we don't really know. And so the best way to get to a sale or a new client is going to ultimately be to serve them. And serving them could mean giving them permission to work on it themselves for a bit longer, right? It may be that they're not ready for a package. Serving could also mean helping them confront some of the fears that are stopping them from signing up for a bigger package.

Because they've expressed that that really is what they want. And they need some hand-holding or some new ways of looking at it in order to bridge that gap. So serving could be more kind of a higher flame, more intense in a loving way. Or it could be a lower flame, more subtle thing. And we also don't want to be on the left side of the spectrum. We don't want to be going in to please them.

Tad, I remember you had a video where you kind of had the different postures you can sell from, right? And there was the very macho posture and kind of the caved inward posture. And that's how I see the pleasing side of the spectrum. You also don't want the intention to be, "Well let's just make it so that they like me." It's important that someone like you in order to continue working with you.

But just like if you go in that way with any other human reaction, for example in a dating scenario, going in to please is not necessarily going to be the optimal intention. Because for example, it could be — use the same example of someone who is you know fibromyalgia patient for example. They really know they need this and they're ready and they want to. It just feels like a whole new world for them and there are some fears there that they may want some help overcoming.

Well if you're just doing it to please them, you're not going to say some of the things they may need to hear if you have the fear of being rejected there. And so I think coming in in that middle place, kind of the middle path of sales. Just coming in from a perspective of serving. It also takes a lot of the pressure off of you in those five to ten minutes before the enrolment call when you're freaking out or feeling like, "Do I need to prepare in some way?"

And just saying, "You know what, am I willing for the next 30 minutes, 90 minutes, whatever it is, to just serve?" And if you're willing to do that, you're going to be starting off on the right foot.

Tad: Amen. Before we jump into the bridging thing, when you come from that orientation of composure and where your commitment is to get to the truth of the situation, not to get to a sale, it frees you up to be very candid with people. And that candour may sound like, "You can work on it yourself for a little while. That would actually be the best thing." The candour may be, "I'm not the best person to help you but I know someone who is."

And the candour may be, "This package is actually more than you need." It can sound like all those things, but it's also important to list up. The candour could sound like somebody saying, "Well I was thinking about trying this on my own," and just saying, "That's probably not going to cut it, frankly." You know, candour could be that. Candour could say, "You know, what I'm hearing from you sounds like fear."

That feels a little off saying it because it's out of context. But you can become incredibly honest. If somebody came to you and said, "Hey, I want to cross the Sahara Desert, you know. I want to hike across it." You say, "Great, well that sounds interesting."

And they say, "Yeah, I'm pretty good. I've got a little Nalgene thing full of water. I think I'm good to go."

And you go, "Do you have a plan? Do you have a route mapped out?"

"Nah, I'm kinda just going to wing it."

If you were their friend, friendship does not look like trying to please them and say, "Oh, that's cool. That's really neat. Hey, good luck." Friendship in that moment looks like grabbing them by the shoulders and saying, "I'm not letting you go. Like you do not have a plan." Listen to me or not.

One of the true marks of friendship is that you're willing to risk the friendship to save the friend. So it doesn't mean controlling. It doesn't mean you know, you're pressuring them. But it does mean a certain level of candour, like "Look, in your situation, here's how long I think it's going to take. Here's how many sessions. Here's how much effort. You know, this is not something you're going to be able to handle in 30 days. I wish I could say it was."

Just as much as candour could be, "You know what, we could do this in one session. You don't need to sign up for a full package." Those are both equally candid, but I think especially in the life coaching and holistic scene, the orientation is so much from collapse and from pleasing that that feels confronting to say to somebody, "Actually, I think it's going to take this." But people want our honesty.

You know, they want to know that what we're telling them is the truth and that we're not just going to say, "Oh yeah. You know, just a few sessions should do it," when it will not. So I just think that candour is such an important piece of this.

Greg: Yeah, absolutely. And I still have a note for bridging, so we definitely are going to get to that. But I want to underscore that. I think sometimes there's a bit too much deference with people who are getting a lot of no's from people who really would be fantastic clients, really good fit. And you know, I have an example. We don't work with her anymore, but we had a woman help out around our house doing some of the chores and helping the house be nice and clean.

And when she first came in she actually had a great consultation. She came in and she looked around our house and you could really tell that she was trying to get a sense for what the job would be so she could create something custom for us. And I remember she emailed us. She went back, there was no further conversation after that, which to me I would have probably had the conversation face to face and offered them a chance to work with me.

But she ended up sending us an email and I think it had about six different configurations. And it's like okay, there's this where we could do this room and this room, but not this room and it would be this much. And it was kind of like, "Well, you're the expert. You do this every week." So I was hoping she would say maybe max two suggestions, right?

"This one is a big cheaper, but it doesn't include this which I know is important to you. This one is a big expensive but it's the all-inclusive one. Which one do you think would be the best fit?"

And it frustrates me so much almost just as an entrepreneur and someone who teaches enrolment when people let that — we actually did end up working with her in the end I think that was just because there weren't many options. But if there had been a good option there, she wouldn't have been necessarily the one who we went with.

And yeah, people are looking to you a bit to help them get a sense of what it involves, what it's going to take, just like your Sahara Desert example. I mean, if I'm talking to the guy who's made 20 trips across the Sahara, I want him to tell it to me straight. And one thing I think will really resonate with coaches is this is no different than what you would do with an existing paid client.

If someone said, "You know, I understand logically what I need to do here, is I need to fill in the blank." For a relationship coach, "I really need to break up with Tom," right? You've already discussed why it's not working and they're like, "You know, I know I need to do it. But you know, and we talk about how to do it and it makes sense, but I just can't get myself to do it." Your job for that session or that few sessions as the coach would be to help them come to a place of peace around the decision and get into action on it.

And it doesn't matter. They might be scared, but you've already agreed together that that's the right move. That's what all the arrows are pointing to. So as a coach I'm sure not any of the coaches on the call, because it's part of their integrity being in check, would have a problem helping push the person or at least lead them you know side by side with them to go execute on that decision. But sometimes when money enters the equation, when it seems personal, when our own value becomes called into question, we do collapse a bit.

And so I think sometimes it's important – you know, sometimes advice I'll give my clients is, imagine that you're not even talking about your coaching. You're actually a different coach and they're talking about whether they should invest in something that's going to improve their life. And you're just at the point in the conversation where you're getting to the end of the call and you're determining action steps and you're helping them make a decision on it.

Now just as the coach objectively – pretend it wasn't you – you know, what are the questions you would ask to determine if it's really a good fit for them? How would you support them through that decision? Because sometimes when we get that more objective frame, it can help.

Tad: Yeah. You know, helping them make a decision, to me it's also when we come at it from this trying to get to the truth of is it a fit, yes and no are equal. You know? And of course this is why having a niche matters so much and why having some kind of filtering process before they ever talk to you matters so that you're not just talking to anybody who's a very low chance of a fit for you. Of course you want them filtered so by the time you get talking there's that.

But then it's a really beautiful thing. It's a very empowering thing to help people come to a place of making a decision one way or another. And the truth is if you find that most of the people don't say yes, it could be an issue with the enrolment. It could be the people who are showing up to find a fit. And then you make the marketing better so that you get more qualified people.

Greg: Sorry to interrupt, but that's one of the reasons why being very confident in your enrolment skills is a really nice thing. Because if you know that you're pretty good at enrolment, you can get a no and know that that's not reflected on the enrolment skills. It has to do with the client who came in. And that's a really nice place to be, because if you're questioning every part of the process, not sure which is the one that's broken or not working optimally, that can be a tough place to come from.

Tad: Yeah. So we'll get these people who come to us and they'll realize, "Yeah, this package would actually be a really good fit." And you can feel that, but then it's like, "How do we engage in this conversation with them?" Given the fact that it's a fit but there are some concerns coming up? And yeah, so how do we? Greg, how do we do it?

Greg: Yeah, sure. So I want to give a quick high-level summary of the three C's which is the general structure I use and teach for enrolment calls. Now we've gone way into detail in the interview that Tad wrote up. So you're welcome to refer to that now or after the call. But I just want to get everyone on the same page. Basically three C's that I like to go through in any enrolment conversation really, but especially with coaching. We're going to talk specifically through that lens today.

The first C is clarity, is what it stands for. And essentially you're clarifying the person's problems, desires, goals, frustrations. You're just clarifying really three stages. Where they're at, the situation. Where they want to go — so as Tad would say that's kind of the island they're on, point A, and point B, what's their vision. And then what are the obstacles that are coming up now or may come up in the near future for them? Why aren't they already at point B in other words, okay?

Once you have a sense of those three things, you should have a good sense about whether they're a fit or not. Right, you should know. You should pretty much know, are you the one to take them from A to B? Are you well versed in those obstacles? Do you help other people with those obstacles, et cetera? And as we're clarifying, we don't just want to clarify the tangible things — okay, you know, you're single now and you want to be in a relationship with someone you have a good connection with. You also want to figure out what would that mean to them to have that result.

So you want to get both the emotional drivers for them and the tangible things that would exist or them. And sometimes people start with the emotional. Really I just want to feel good. I want to feel at peace or I want to feel like I'm unleashing my potential in some way.

Tad: Sorry to interrupt. I was going to say, when you're starting to map out the emotional context, one of the things you may find is there is none. You know, you start talking about, "What would that mean for you?" And as they talk about it, it's totally flat. And as a coach that's a moment for you to show up. Because what may be happening is they're doing something that they think they should want, that other people want.

So it's like trying to find all these emotional drivers of why they're doing it. Part of the reason we do this is to actually just check to see if this is congruent, to see if there's you know, if it's something they really do want at all. Because if there's nothing there — if I hear someone flat line — and I've had this with clients where they're talking and as they go on and on about something, they just lose all their energy.

And I'll just pop in and be like, "You know what? Do you want this? Because I'm not hearing any real reasons." You know, it happened with one of my clients, we were talking on the phone. She's in my mentorship program. She's one of these serial entrepreneurs. She's had a million businesses, a lot of ideas she's never gotten off the ground. Every time she would talk about nonprofit stuff and these causes, she would light up.

And finally I said, "Why don't you just start a nonprofit?" She's like, "But . . ."

She had this whole identity being an entrepreneur that got confronted. She was like, "You know, fundraising. You're always having to raise funds for the nonprofit."

I said, "Well with a business you're always having to market to get clients. What's the difference?"

And she was just like, "I had never thought about it like that." And so she ended up totally dropping the business thing and starting a nonprofit.

Greg: Wow, great. Yeah, I mean if you can be the person who helps them have that big of an insight around what they really want or where they could be heading, then you really become a trusted advisor at that point in the conversation. So I love what Tad added. And typically the usual thing for me is that by the time someone is talking to me, they really do want to have a lot of desire around that area. And so I just need to know the same way again as if they were an existing paid client, I'd need to know what motivates this person, because this is going to be a hard road.

So what are the drivers? We're not tuning anything up. We're not saying, "That really sucks because of this." Right, we're not twisting into a pain point. We're just getting a sense of they don't like this because why? Why is that not where they want to be? They want to be here; why do they want that? Because later in the conversation, as they say — you know, for example, I like this analogy, crossing the Sahara, right?

If the person says, "I have the Nalgene and I'm an experienced camel brigade owner," then I'm going to say, "Well you really have two options, right? You can not cross the Sahara, or you can do it as part of a camel troupe." And there's no real in between because it's quite a trek. So are you going to do it or not?

And they're saying, "Well yeah. I just feel like I didn't expect to invest so much in crossing the Sahara."

And you can say, "Well, let's go back to why this was important to you, right? You said that the person you love most in the world is at the other side of the Sahara. So that's really important to you, right? I know that's worth a lot to you. It's one of the reasons you started off in the first place." XYZ, right? So it's something that we can come back to if they get to a place — sometimes when we get to the investment at the end, the tendency is to get tunnel vision and view that in isolation. Right? I don't want to pay 5K for a program. But I do want to — whatever it is — double my business.

So if I can come back to the reason why we're on the conversation in the first place, now at least I can make a realistic comparison. I'm not just viewing one side of the scales. I'm also seeing what it's worth to me. So that's why we do that as part of the first C.

Tad: Thanks.

Greg: Okay, and then the second C is connect. So this is where we talk about bridging a bit as Tad mentioned. And one of the things that I've seen in enrolment conversations that don't go as well, or frameworks I've seen that I've found aren't as effective is they do emphasize clarifying the client's situation and desires. And they obviously have a part of the conversation that they might call a close, or a point where you're helping them come to a decision.

But they don't have this middle part where you're saying, "Okay, this is what we've come up with together. This is what we're clear on and this is what I'm hearing." You know, I often do a recap at the beginning of connect where I'm saying, "Okay, so you mind if I just go through and reflect back what we talked about to make sure we're on the same page?" Because if you're hearing something wrong, you know it's like do not pass go at that point. Because you don't actually have a clear sense. The other thing that does is it just helps them feel understood, right?

So it's good for them to know that you're listening. So if that's where you're at and you say, "Does that sound right?" and they say yep, say "Great, so that's where you're at. Then here's what it seems like are your next steps." So what we do in connect is we take the situation that we see that they're in, and then we think in our minds as we're going through that summary, does it connect with what I'm offering today? Does it connect with the work I do? With who I am? With how I helped people in the past?

If there is no connection there, right, if the person wants to cross the Sahara and you're a business coach, right, there's no connection with their current goals. Maybe later in the future. So that's the point where you would say, "Hey, if that's where you're at now, I'm not the person to work with you, because I really specialize in this. But here's someone who can help you here. Or here's a book you might read." You try to send them to a source that would be helpful for them.

Now if there is a connection, we want to help them see the connection before we propose a package to them, all right? So before we're even talking about what we're proposing, we want to kind of create that, start to weave a thread, an existing thread. The threads are all there, but you want to help that in their mind to become a strong connection between their desires, their situation and their obstacles and what you offer.

And the way I typically like to do this is the first one is the recap. Go through the recap. It already starts to make the connection. You're someone who's a trusted advisor and is listening to them. The second thing I do is I typically give them — we kind of create a high-level game plan together that is really just a reflection of what you covered in clarify. There's typically not that much new stuff there.

You're saying, "Okay, so your biggest obstacle right now to crossing the Sahara you said was that you didn't have a way to carry that much water. And so the first thing we need to do is we need to get you a source of water that's going to last at least six months." I don't know how long it takes. But step one is how are we going to carry that much water. So water is number one in the game plan.

The second thing is you're taking their obstacles and their frustrations now and you're saying, "Okay then, here's what we need to tackle preferably in this order." Of course those are the things that you help them with, right? So if there's a connection, those are also the things you'd be covering in your program. And so the typical structure that I use is it's X topical area so that they can achieve Y emotional driver, right? So we're helping them make that connection. "Okay, so you said one obstacle is water. We're going to want to get the water handled so that you can make it the whole six months, have the energy you need to get there safely."

Because the energy, the safety, that's all things they mentioned in clarify. So since we have those notes we're tying their obstacles to the desired outcomes, what that would do for them. Again, this is actually really valuable for the potential client because one, they've never heard clearly from someone else probably all their challenges, anxieties and goals listed out so succinctly the way you're going to paraphrase it. They also haven't probably taken the time to just say, "Hey, these are the 3-5 things that I need to focus on. These are the 3-5 focus areas."

And it's not hard for you to do this. It's a very easy way for you to add value. You've been listening to them and you're an expert in the topic. So I like to lay out those 3-5 things in that framework, right? X things so that you can achieve or feel Y. And then you can stop after each one and say, "Does that sound valuable? Do you have any questions around that one?" So we're just consistently checking in. And at the end we say, "Does that make sense? Does that sound like your next steps?"

And you get sign off on that, that's the point where you can you know start to transition into the final stage, which is commit. Helping them make a commitment yes or no on this.

Tad: Before we jump into the commit, one of the things I talk about is when people are struggling, when people are in pain, there are typically three things that they need:

empathy, context and guidance. So empathy is kind of the recap. That's one way to do it. But they've got to know that you get it. Because it's the worst when you're in pain and you get a response from somebody that's not empathic. It's really painful.

So that's the first thing. You know, the old "They don't care how much you know until they know how much you care," is just true. Second thing they need is that context, because they don't know why they're struggling. They don't know what they don't know. All they know is that they're on island A but they don't see what's missing. There's a lot that you as a practitioner will see and notice that they wouldn't.

So helping giving them a bigger context of like, "Yeah, okay, you tried to cross the desert a couple of times. It hasn't worked. You just woke up, passed out, badly sunburned. Got it. Okay. And so here's some things you may not know about this desert. Here's a map of it. Here's how big it is. And here's the temperature fluctuations and here's some of the things that a lot of people use, like shelters and camels to carry water and a map and a compass and all these things."

We start to give people a bit more context. That's really helpful for people just to know, to see things maybe they haven't seen before. And so I kind of feel like there's kind of a blank so that blank can happen. Like here's the things that are missing. Here's the high level game plan. Here's the high level map or route we're looking at. It starts to give people a bit of context which is immensely helpful because it's so shitty to suffer. But it's much harder when you don't know why, when you're lacking any sense of the bigger picture.

You just feel lost in it. So at least if you have this conversation where you come out of this like, "Oh yeah, okay. Actually, here are the elements I need to handle it. Here are the steps I would need to do." That's so clarifying. That can cut people's suffering in half alone, just even having a map to look at, even if it's you know at 30,000 feet. And then the third thing that people need is guidance. You know, giving them options is fine, but it's true what Greg said.

If somebody came to me and said, "I've got gallstones. What can I do?"

"Well, there's actually ten theories about this." On one level that's great, because that's probably more than I had before, so that's more context. On another level, too many of those is overwhelming in a different sort of way. It's gone from I have no context to now like too many contexts. And so what I really want is somebody who might say, "Look, there's ten theories. Three of them I think are the most solid. In your situation, this is the one I'd recommend and here's why."

And in this kind of guidance you're making the case for the point of view. You're making a case for a certain approach. You're not making the case for them to hire you at that moment, you know? It's funny, I just wrote a blog post, one of my most recent ones about what's the point of doing an intro workshop? I was like, the point of an intro workshop is

A, they get to meet you and get a sense of your vibe. But also where you share your point of view.

And you are making a very heavy case for your point of view, you know, as compelling as you know how to do it. And that's not saying they need to hire you. That's not saying they need to work with you. That's just saying, "Here's who I am. This is how I see it. Like I do happen to have an opinion about this issue, so let me lay that out in front of you."

Because the truth is, if they buy your point of view, if they're aligned with it, if they agree with your point of view, when you finally make an offer, it has somewhere to land. They're already leaning in. They're so much more likely to say yes. But the truth is if you lay your point of view and they disagree with it, it really doesn't matter how good your offer is because they're like, "Well, I just fundamentally disagree with how they see it."

So the guidance is we're giving a context, a certain point of view. And we're saying, "Look, based on that, this is the general approach I would suggest." And the tagline we also use is, "Whether you work with me or anybody else, this is the approach I would suggest and here's why."

If you could really get it, but it's like, "Yeah, they can work with somebody else. It's fine of course." I mean, you've got to pay the bills. But fundamentally we are saying — I was saying to a client — people ask me, "How do you not be desperate when you're sitting with somebody?"

Yes, you need clients. That's true. But you don't need this person. You know, it's like you need clients in general, but the person in front of you, you don't need them. You just need somebody to show up and pay the bills. So yeah, you get savvier about your marketing, your filtering and all that. But it's not like you need that person. And when you can get to a point where it's yes or no and you're just saying, "Here's my take on it."

And the truth is if they're like, "Yes, that perspective, that point of view, that map, that route, all of that makes a ton of sense to me," then — it's funny too. I don't know, Greg, if we've talked about this, but it's so funny the difference when they enter a workshop. You could have somebody saying — it's fundamentally the same workshop and one person says, "Listen, sign up for my advanced program, because in my advanced program you're going to learn this and this and this."

Another presentation might say, "Look, if you want to handle this issue, you need this, this, this and this." And it might be identical you know in terms of what they say and what they cover. But there is something about the framing of like "I'm sharing all of this to convince you to buy this thing because this is inadequate." Versus, "Look, I'm giving you 30,000 foot view and if you want more, my program goes into it."

It lands so differently for people because it is a different orientation.

Greg: Yep, one is service, one is selling, right? And so I want to take us back to that spectrum because guys, here's the cool thing: when you're selling through service — I want to really underline this because it's rampant in my industry. This is not a free coaching session. It's not quite that, right? Because one thing you could do is just offer — and sometimes when coaches start off they do this and I think that's fine.

But a lot of coaches will continue to do it which is just they offer free coaching sessions and they treat it as though the person is already an existing client. The issue with that is you're going to zoom in on one very specific small issue and it's going to be like putting a Band-Aid on what's going on, and the arm is broken. Right?

Just to use one metaphor, right? But you're going to get that issue, and you may actually get it to a good place in the 60-90 minutes, except that was only step one of whatever. So if they don't have a high level game plan, they're not going to see the need or value in working with you on an ongoing basis. And so it's good practice. It can be good to get yourself out there at the beginning.

But that's more of the please framework. That's more of the please side of the spectrum. It would please them to just get free coaching for 60 minutes, but it may not serve their progress in the long term because they may feel like they've gotten it handled and actually they've only addressed 10%, and without the other 90% it doesn't kind of work in an ongoing way.

It's like the Iaveta person giving them one recipe. Well that's fine, but that's not going to help the symptoms, right?

Greg: The person comes and says, "Yeah, I want to cross the Sahara but I don't have enough water." "Oh look, here's what you do about the water situation. Here's more water." You genuinely solve it.

Tad: You get them a camel that can carry all the water, but they leave with no compass, no shelter, you know? And you've kind of doomed them unintentionally by not — well, that's kind of heavy — but by not pulling back and going, "Okay, before we talk about it, again the water is one thing. But might there be some other things worth considering here?"

Greg: Right. And when you have a long-term paying client, they're already in the package. That's why obviously you focus on what you need to focus on for that session that comes up. But that's why — and it's also not the selling side of the spectrum where it's just some 15-minute consult. You say, "Here's my fees. Here's what we do." I mean, there's been no value that's been created as a part of that. So that service position and whether it's a free workshop or an enrolment conversation, it's kind of in between.

It's kind of in between as what you imagine as a classical sales conversation where it's about making a decision; it's also to the side of the spectrum where they're leaving with some new insight or way of looking at the thing that really is valuable to them whether they decide to work with you or not. And I'll say these enrolment conversations are great market research.

So you may get to the point five years from now where you never do enrolment conversations; it's all free workshops, it's all at scale. But you needed to do those 50 enrolment conversations in order to know how they were talking about their problems, why it was important to them, where they wanted to go. If you take good notes, you have all the languaging for however you want to scale it. Whether it's a sales page, whatever it is.

And I just want to underline that. Because to me those one and ones are — and as well I almost always do them in my business because it just keeps me back into that touch point of where the person is at. So I just wanted to underscore that. We're in the service. It's kind of in the middle. It's not quite a free one off coaching session and it's not just that 15-20-minute consult where you're discussing your fears.

You're creating some new high-level approach.

Tad: That's interesting. I'm curious, how do you address that when somebody says — when they're coming with some suspicion. Like, "Is this a sales call? Is this actually a coaching session?" I don't know if anyone's ever said that to you.

Greg: No one has said that to me. But you've got to be aware of the internal dialogue that's going on. So it's all about how you frame it, and I think this is actually not a bad thing to talk about in terms of, well then how do you frame these conversations? The fact that you have that connect phase in there — remember, that's where we go through our 3-5 high-level game plan points, where we kind of outline what you've been hearing from them, what they need to work on. Again, whether you work with me or with anyone else.

And of course as you say that, you're the one who drew them the map. So if they're on board with your point of view, then you're probably the one that they're going to want to do it with. So because we have that, it's much more valuable to them now to spend some time with you. Because we can say, "You're going to leave with a high-level game plan. You're going to be more clear on why you haven't reached your goals here. And you're going to leave with a game plan whether we decide to continue to work together or not."

And that's really helpful. And so I typically frame it as a diagnostic, you know, and that's how I describe it to people. So it's not so much just a pure coaching session. And I really want to get a sense of where you're at and where you want to go. Otherwise I just won't notice if we're a fit to work together ongoing. But we will be getting a new level of clarity around why you're where you're at and what you need in order to move forward. And if at the end of this conversation — I say this.

As I line it up, I typically say at the beginning of the conversation, "Hey, here's what we're going to go over. We're going to go over where you are, where you want to go, what are some of the obstacles in your way. If at the end of that it sounds like we might be a fit to work together, I'm totally happy to talk about that. Sound good?"

And they let me know if they have good information for that. And so I've prefaced it but I've also made clear that it's something that's almost a footnote to the meat of our conversation. Which it is. You should be spending only 15% of your time approximately in this final C which is commit. Most of your time should be clarifying and connecting. Because if you've done that right, you've gotten them 90% of the way there, if not 100%.

Tad: It's interesting because I feel like for most people, the kind of people I work with, the clarify and the connect, that's great, easy. But this whole commit thing is terrifying. So what are your thoughts? How do you engage with this? Because I think a lot of people are like, "Yeah, I'm happy to sit and listen." But then there is this other, "Great, now there's been this connection and some context has been set and you really do understand."

And you're like, "Oh yeah, this could be a fit for them to work with me. Oh shit, terror. How do I talk about it, because I don't want to be pushy. You know, I'm not all about going for the close. So what do I do? How do I even orient to this?"

Greg: Yeah, that's a great question. It's really important. And I actually would encourage this is probably a good time for people to start thinking, are there specific questions you want to ask me that you want to type into the teleseminar page? Because I'm happy to go into your specific questions, especially around closing.

Tad: Yeah, I just put it at the top of the group. I'll pin it to the top where it just says any questions? So if you have any questions, please just type them in a comment below that.

Greg: Great. So yeah, I'll be happy to answer questions there. But you're totally right, Tad. This is a place where people switch modes and their clients feel it, or potential clients feel it. In other words, people are like, "The first part of the call was the service part and now I have to try to get them as a client." And that is a very abrupt transition if you're viewing it that way mentally. Really comes across.

So we need to get the whole call as service. This is just the next logical stage in the decision-making process for them. Okay? So as much of a flow as you can get between these stages, the better. You know, this is, if we were to work together long-term, there are lots of different transition points that sometimes people get stuck on. But a big one for commit, so when we're going from connect to commit, so we've kind of gone over the game plan. "Does that make sense? Does that sound valuable?"

And then I typically say, "What are your thoughts at this point?" You know, I want to give them some space. I check in a lot during these calls. I just want to give them the space to say, "Well that sounds great by I'm concerned about X." It might not even be specifically —

they haven't heard about your program yet, but it will be some sort of thing that if you didn't uncover it then would have come back when it was maybe a little bit too late.

So I always like to give them that chance. I call it the yes test, meaning what's the question that you ask that will make it more likely that after you help them resolve that, then when you propose your package it's going to be a yes? Because once you've proposed your package, you really want to have a sense of the lay of the land before you go into that phase. Because if there is something that you didn't know about and now you're trying to position your package for their needs, it's not going to be as potent.

That's kind of a violent word to use. It's not going to be as resonant for them. So I like to say that. And typically again how I phrase it is, "What are your thoughts at this point?" So then that kind of transitions us into the third sphere which is commit. And I ask them, "Do you have any questions for me at this point?" So at this point I say, "Would you like to hear more about how I could help you achieve that? Or how I could help you implement that game plan?"

So again, it's very easy flow now because we positioned it as these are the things, whether it's me or someone else, that you want to tackle. And would you like to hear how I might be able to support you with that? Again, you're creating a vacuum. There's no push. In fact, you're stepping back with your question. And you're creating a space that they can step into if they like, which creates a bit of momentum for them. So we're creating a vacuum for them.

Instead of being pushy, we're stepping back and kind of getting permission with that question to move forward. We've all had someone — you know, I walked into Gold's Gym last year and the guy immediately was like, "Hey, you know it sound like you probably want to be in this package." He didn't ask me any questions. There was no permission for him to offer me anything.

So obviously it's going to turn on my little alarm which says get out. Right, and you don't want to be triggering that in the people that you're talking to. So once we ask that question and they say, "Yes, I'm interested in hearing that," say, "Cool, awesome." Then you talk about that. "Here's why I think it would be a good fit for us to work together. Before we talk about the logistics of it, let's just talk about why."

And this is where you want to go back to a few things. Talk about you know why specifically — if you have a specialty around what they've been talking about, if you've worked with a lot of people around that specific game plan, right. "Let me tell you why. I had a client just like you. Her name is Liz and she's a holistic health coach and she came in in the same place. She felt really awkward. She kept going to networking events and she didn't know how to explain what she did."

Again, you just talk about the case study, right? Where they were when they started, where they ended up and the obstacles. And if you have a case study that really matches their perspective it helps with credibility and it also helps because they can see someone else has succeeded in this journey with where I was at.

So case study is great. If you don't have a case study, you can say, "Because you're an absolutely ideal client for these reasons. I can tell we have chemistry with this." Whatever is the reason you're proposing your package in the first place, just tell them. Let them in on it. Let them in on your thought process there. Because it will help reinforce that connection for them.

And then once they have heard that, now we can start to talk about the how. We talked about the why of how we're presenting this package. Now how might we work together? How could you support them? This is where you want to start to go into the logistics, but in the context of that game plan. Right? "So here's what I would recommend for you. I have some different packages for people, but I think the best fit for you would be this three-month program called X, fill in the blank. And in the program we work on those three things that we just mentioned. So month one is this. Month two is that."

It might not lay out exactly like that, but you could say, "You know, each week we're coving one of those things we just talked about. So that by the first month you're at a point where this X thing isn't a problem anymore like you mentioned." Whatever it is. So we're just using the lens of what we've clarified. Some people do all the work to clarify. They may even do the game plan and connect. And then they throw it all out and the pitch sounds — I don't even use the word pitch.

The offer sounds the same with every single person they talk to, but it shouldn't. That's why we did all the work in the first part of the call. We want to customize our entire offer to them. Not that we're changing the offer exactly, although if you have a custom package that's fine too. But just in the way where they feel that it's designed for them because it is. If you're talking to them still at this point, it should be.

So as you go through the logistics, view it through the lens of the game plan and what they want. And you just outline exactly you know what you're going to do together, how many calls, do they have email access. I mean, this is the basics. Most people don't care so much about the how. They're more trying to get a sense of, are you the person to help me with this? I mean, you don't need to spend 20 minutes here, but just give them the overlay of what that looks like.

And then we get to the what which is really typically the investment. And so we're checking in at each stage here and we say, "Okay, any questions on how it works and what we just talked about there? Does that sound like it will work for you? Does it sound valuable?" They'll say yes and they'll either ask themselves, "Well, the only thing left is the investment.

What's it cost?" Or you can say, "Would you like to hear what the investment is?" if they're not asking yet at this point.

I always tell coaches — now we're getting a bit into the weeds — I think it's helpful because people do get stuck here. I always caution coaches, don't use the word cost obviously. I mean typically for people it's an investment in coaching because there's some sort of return on that investment. So even if my client used the word cost, sometimes I even correct them subtly. When they say, "What's the cost?" I'll say, "Okay, yeah, you want to hear about what the investment is." And they'll say, "Oh yeah. Yeah, I want to hear about that."

Here is a scenario where languaging can be important. And then I just very simply say, "Okay, so fill out your client roster for that 8-week program, it's $5k." And just silent. Just be silent. Don't make it more complex than it is. And this is a place where a lot of coaches get caught up because they're like, "It's $5k, but there's a payment plan for this. And if you really couldn't do it, we could do it with this thing. And you know, I think this is right for you."

This is not the time for that. This is just the time to tell them the investment and be silent and wait for them to come back to you. And that conveys a lot of confidence, a lot of certainty in what you're offering. And you don't get yourself caught up in an insecure place there. And if you've got to mute your phone to be silent, do that. But that's what I'd recommend for that scenario where you're talking about the investment.

And at that point you're in just a free-flowing space there. I mean, you're not on a structure or anything at this point. They are going to ask you questions. They're going to say, "Oh man, okay I didn't expect it to be that much." Or, "Okay, I've got to think about it." Or, "="Okay, it sounds really good. I can tell you're a good coach, but I want to talk to my partner about it."

So that's where we get into helping them move through specific concerns, you know, help them think through specific concerns. So I'll just take a pause here, because that's a whole other dialogue which we can have. But I want to make sure — Tad, does that seem clear? Do you have any questions so far?

Tad: Yeah, well the thing that came up for me, you were saying it offhandedly. "Here's how we can work together. I've got a bunch of packages and here's the one I think would be the best fit." I just want to flag for everyone that Greg has packages. It's not just like, "Oh great, so I think the way to work together would be let's book a call. We'll have a session and we'll see if after that we want another one." That's not the thing.

He actually designed and crafted certain packages that are perfect for his target market to help them with the problems that he knows that they have. He just started hearing, "Wow, a lot of my clients seem to struggle with this issue. What's my take on that?" And if I were going to really design a program that would walk people through what are the steps and what might a program look like that would walk people through the steps?

And he took the time and the care to really develop something that he was immensely proud of. And so I guess if you don't have a package, this can sound maybe a little abstract. But I can promise you if you really sat down and said, "The clients I want to work with, they're single dads and they've just gone through a divorce and it has really emotionally wrecked them. Okay, so what would I come up with as a package for them?"

I can promise you, if you really sit down and come up with a package that is the kind of package you wish you'd had when you had gone through that issue, or a package that when you look at it, you're so excited about it — you're like, "Oh my God, this would really help them." It's funny, I'm working on something slowly in the background, not about marketing but I've been really interested in men's work over the last few years.

And seeing how many men struggle with shame for example. And realizing I'd love to come up with an online program for men walking them through how to deal with shame. And so I've just been taking notes on it, but I even took a while to sit down and start to map it out. And as I was mapping it out, I felt so excited about it, because it was like, "Oh man, this would really help. This would really work. This would be such a relief for so many men to have."

And the more I thought about it, the more I desired it, the more excited I got. And so we're not talking about just putting together a shitty package, or like, "Yeah, I've got this program." You actually put so much thought and heart into it. So when you go to offer it, all of that pride is behind it. It's not pressure. It's not pushing. I mean, I suppose it could be depending on where you're coming from.

But to say, "Yeah, I've got this package and I think that's the one for you." You're saying it knowing that so much craftsmanship has gone into it. And the more work you put into it, the better that package is, the more proud of it you are and the more results you've gotten from it. You know, if you have a package and you've already taken dozens of people through it and got these amazing testimonials and results from people, it's a very different feeling when you get to that moment.

Like, "Yeah, based on what you said, I think the package is this one. And here's why I think this one for you." You're kind of excited for them because you know what might come out of it. So that's what I would say about that.

Greg: I love that. And you know, I think that that's absolutely where you want to be heading. And if you're not there yet and you're listening to this, I think that's okay too. You know, I used this same structure and framework to my calls when I didn't have a package with a name and it was just you know, three months. I would work with people for three months or six months, right?

And you still do the same things. Just make sure that they know why it's three months or six months that you're starting it, relative to their game plan and what they need.

Tad: That's the thing too. When you're in that conversation with them, you're really listening again of like, what is the package? Even if it's just in terms of amount of time. You might say, "You know what, just from what you're saying, you actually seem really together. It sounds like you just need some help on this and this and this piece. And I think we can do that in a month. Why don't we start there and see where it goes?"

Or you might say, "Can I be honest? You're a disaster right now. I get it. You're in a lot of pain. I'm hearing how this is connected to some really deep stuff. Number one, I think therapy is also important too, but in terms of the coaching, I think this is probably like all the pieces that need to be put into place. I think we're looking at probably a six-month thing."

It's such a fucking relief to have somebody be honest with you and just call it how they see it. And then it's not pressure. They're going to do what they want to do. But at least somebody has told them the truth. The thing is I can imagine that sticking with somebody where then they talk to somebody else and it's like, "Oh yeah, no. Just come book a couple sessions. We should be able to handle this." It might start to feel suspicious. And there's a very good chance they're going to do those two sessions and it does not handle it.

And they're like, "Oh, I talked to this coach and they were like — they said it would take this long. They were really telling me the truth. I thought maybe they were just trying to sell me." So you've got to be reliable. You can't just say, "Oh yeah, totally," just because you're trying to please them because you're collapsing because you want to get them as a client.

Of course in the conscience it's like never try to sell somebody or offer somebody more than they need. Sure, that's obvious. But what about don't offer them less? Like how is it integrity to say, "Yeah, a Nalgene full of water, that will get you across the desert?" That hurts people.

Greg: So here's where we have to be really honest with ourselves. We're in need to save the conversation or we're helping them move through or think through their concerns. And this is where it's really easy to start — I want to phrase this in a way that doesn't seem aggressive — but to not buy into their stories. The same way we would if they were a paid client.

Because there's two mistakes that we can make if we're not coming from the intention of service. The one mistake is we paint the red flags green. There's a red flag there that you're not a fit or that this isn't what they need or that they would just be a nightmare as a client. And you paint it green because you're in the conversation, it's great to make money and you know, you kind of overlook that and keep moving forward.

The other thing that you can do is paint the green flags red. And by that I mean they've laid out very clearly for you what you need and connect really well to what you offer. They're excited, you're excited and you let the smallest concern derail a potential relationship and transformation for them. And so this is where we really have to be grounded in the conversation around their concerns. Because our intention is to help them make the best decision for them. It could be a no, but it could also me a scary yes. You know, it could be a yes that has ramifications in other parts of their life.

It could be a yes that comes with self-judgement. There's a lot of ways that we can paint red flags green. And that typically comes from us almost expecting a concern and using that as an opportunity to release the tension and get out because we're uncomfortable with our own value.

So if they said that they don't have the money right now or they said that it's a big investment for them, so again, let's just get off the phone. Is that really of service to the client? It's possible that the investment is so high that they get tunnel vision and you wouldn't do good work together. Definitely don't push that person to a yes. But if it's a matter of saying, "Okay, right now you're spending however much on your Ferrari just in gas each month. And you've just realized that that's not helping this area of your life, and this is a priority because of X, Y and Z that you mentioned. Is it possible that this would be the investment you need to make right now?"

"Oh yeah, actually you're right. I haven't been investing my money in a way that it correlates with my values based on what we just talked about." So I just want to be really aware of that. This is a place where if you're not grounded the way you would be as an objective third party, there's stuff coming up inner game-wise for you around your value and, "Well if they say yes I now have to deliver that thing we talked about." Now that's scary for you.

What I tell my clients is you already made that decision. This is not the part of the call to make that decision because you already should have uncovered all that. Right? You already talked about if it connects to what they need. You already talked about almost everything. So at the end of the conversation, to say, "Oh, you know, now maybe they're not a fit," just because you get uncomfortable, isn't necessarily the move to make.

Now there are real concerns and objections with your coaching package that can come up. So I don't want to say you know every objection or every concern is an illusion. That's absolutely not the case. There's a reason there's this part of the conversation. I think for most coaches I meet, they should probably err on the side of being a bit more firm and a bit more curious about what's behind that concern.

Tad: So let's say somebody says to you, "That's a lot of money. That's too much for me. You're charging too much for this?" Well, let's actually break this down. If somebody is like, "Boy, that's a lot of money," how do you engage with that?

Greg: It depends on how you're looking at it, right? So we just talked today — I'm just giving you examples from my own focus. "We talked today about how you're only making $1,000 each month in your business, but you need $5,000 to support your lifestyle that you have right now. So each month you're losing money, right? So whatever we need to do needs to turn that balance around. Whether it's with me or someone else, you need to turn the balance around."

So compared to the $4,000 deficit each month, it's actually not that much, right? Or "The goal is to get you to $5,000 each month, right? So $5,000 if you're making $5,000 each month is actually just a portion of that year's earnings." And so that's one thing I might mention. Again, we're bringing them back to, "Okay, we get that there's an investment." Because that's just one side of the scale that they're weighing in their mind.

So if you imagine a scale, one side is how much is the investment. And the other side is how much is it worth to them? Ways they can go into that are, you know, what would it mean to them to achieve this? What is it costing them to stay where they are, emotionally and tangibly? But they're weighing those two sides of the scale. And if how much it costs them to invest is weighted more than what it's worth to them to move forward or what it's costing them to stay where they are, they won't invest.

So we just have to help them see both sides clearly. We don't need to necessarily weight the other side. We don't need to say, "Well you're screwed if you don't do this." We just want them to see clearly what it's costing them, right? So it depends, how much is it going to cost you on your own and buy the brigade of camels and buy the water thing? We already have everything, right? So that's the first response I would have is it depends.

Or you can just be silent. I mean, there's no real question there. So they could say, "Oh that feels like a lot of money." And I would just be silent and wait for the next question and let them sit on that a bit.

Tad: I do feel like part of our job can have these confronting conversations with people where it's like, "Okay, I've heard you say that this is really important. You're wanting to achieve this. And I get that it's costing you in all these ways in your life. And I'm also hearing that the money is an important thing for you right now. And so I suppose it's a decision point or you of what's more important for you." And there's no judgement you know.

Greg: Well said.

Tad: You know, "The money could be more important for you right now, and there's a lot of reasons that could be so. And I can imagine myself in that place and I've been there before. But this could be a moment for you to just reflect on what matters to you more right now."

Because then they really have to do that weighing themselves. They have to really look at it and say, "Okay, I spent $5,000 on this coaching package. That's a lot of money, no doubt about it. But if I don't, I'm losing $4,000 a month." And they start to weigh it out. And they're also weighing, "How connected do I feel to this coach? Do I really think they can help me?" Of course that would bring up other questions.

"You know what, I would like to. I just really need to know this."

Greg: Yeah, exactly. Okay, it's a great point. There's almost always an additional or complimentary thing behind the money question. Because I'm sure if you're listening to this now, that's probably the most common concern you get, is that it's the money. "I would do it. You're a great coach. I just don't know if I have the money."

But just like time, it's all about how you prioritize it. So is there enough of a priority for them? And that's how you've got to figure out what would make it enough of a priority. What priority is it? Is everything aligned with the priority it actually is? Or are you downgrading that? Another question I would ask is you know, if it was a more direct question, if it wasn't just them reflecting that it was a lot — if it was, "Oh, you know, I want to do it but whatever." They bring up a concern around the investment, right?

Then I would say it could be worded in many different ways. My go-to question here, it's partially just to help me stay grounded just to have a go-to, but it also brings out there are other concerns. If you walked out of your house or apartment, wherever they are right now, and someone handed you a check for $5,000, would you be a yes? And it forces them to say, "Is this really about the money?"

Because they might say, "Well actually I don't know, because I'm actually kind of scared that if I do this and I lose the weight, what's going to happen to the relationship with John, or whatever?" Right? So we've got to get at those other fears that are involved in the transformation because one of the things is if it's a coaching relationship, you're not just selling them a widget.

I mean, there's not a lot of potential scary stuff if I buy a new Macbook that day and walk out with the Macbook. But if you're talking about me taking my business a new level, you know, breaking up with someone, getting a new relationship, losing weight, whatever it is, there's probably a lot of reasons why they haven't done that stuff yet. And those sometimes actually come out during the concern phase at the end. So what you want to get, you've really got to hear this, that their concerns are often — not always — often a reflection of the reasons why they're stuck now.

And so one of my biggest encouragements to you is that when they bring up a concern, see if that's at all related to the obstacles and the reasons why they're in the situation now and they haven't been able to get to point B. Because they may say, "It sounds great, but I feel like I'm not going to have the time to really commit to this."

Say, "Okay. I understand. Let me ask you though, is that pattern of not having enough time something that you want to continue? Because we talked about that earlier." Right? Or whatever it is, right? And it really, really tests you as a coach and makes you say, "What's really going on here?"

So I don't want to dismiss that there's absolutely times where the investment isn't there, and then you can talk about is it worth it and try to create the investment? There's other ways to do that. But I just like to ask that question to start digging out the other pieces of the puzzle for them.

Tad: Yeah, you know, some of my colleagues, Jessie and Charlotte, when they get to the money thing, if it was really like, "Okay, if somebody gave you $5,000 would you do it?" "Yes."

"Okay, well would you be open to brainstorming ways that we can come up with the money?" Sure.

Greg: If they just had a conversation with you that this is the most important thing in my life right now, then it's like, "Okay, well how committed are you?"

Tad: Yeah, you know? But it shifts it from it being this objection you've got to overcome to it's just like a conversation where you really are clarifying. That's why I love that question of, yeah, if somebody just gave you $5,000 would you do it? Because if the answer is no, there's information there. And if the answer is yes, you're clarifying where they're at.

And if they're like, "Totally. If I had the money, I'd do it," okay, well yeah. Well why don't we talk about that, about where that money might come from? You know since there isn't that mysterious man with the $5,000. Let's talk about where that might come from.

Because sometimes you'll be able to help them see possibilities for money that they had not seen. You know, that they're just so in their own life. And of course there are payment plans that can come up. Now what would you say if somebody said, "Well I really need to talk to my partner about it"?

Greg: That's the next thing I was going to bring up, so I'm glad you asked. So just like the investment objection, it's okay if they have to talk to your partner. So I know you have Ari Galper as one of your colleagues, Tad. He talks about don't push back against the objection, is how I take his main thought. It's a very Zen approach. It's a very judo approach. Just kind of let them know that it's okay either way so that they don't have something to push against.

So I let them know, I say, "Okay, that's totally cool. I think that makes sense to talk to your partner. It's a big decision. Do you mind if I ask you a question?" And they say yes. And so then I'd say, "If your partner's a yes, are you a yes?" So they are going to answer this in a number of ways. They could say, "Well yeah, if my partner is a yes, then I'm definitely a yes." So I say, "Okay, it sounds like you're a yes now then. And it's just a matter of getting your partner's buy-in. Is that true?"

And they say yes. And then I'll say, "Great. The only reason I check is because sometimes people will defer the decision to their partner. And your partner obviously wasn't on the call and it's not their dream. So they don't know everything that you just told me. And that's problematic because it also isn't really fair to the partner because it's not their life, it's not their business. It's not their decision to make. But if it's just a matter of kind of wanting your partner's support, I think that makes a lot of sense. Otherwise it would kind of be an uphill battle for us as we try to reach the goal. So do you mind if I give you some perspective on how to best help your partner be on board?"

And if they say yes to that, then I say, "Okay, cool, great. I just recommend you tell them what we just talked about today. Like tell them where you're at now. Tell them a bit about that vision you explained to me and about how you've been trying to work through these obstacles but you just haven't been able to on your own. And that you feel like this is a good fit if that's how you feel."

Right, so now there are terms and they have the game plan so they can kind of walk through the game plan with their partner. That's another reason we do it, to give them a tangible thing so they don't just go to their partner and say, "Hey, talk to this guy and he's going to talk to me for 90 minutes." Right? So that doesn't really mean a lot for the partner. So that's why I ask.

Now if they say, "I don't know if the partner is a yes, I don't know if I'm a yes." Well then it's like, "Well, let's talk about that. Let's get you to the point where you're clear and then have the discussion with your partner. Because I have found that when people approach their partner and they're not sure, the partner will just match that energy, right? I mean, the partner is not going to be more confident than you are about this."

So just asking that question opens up new objections because you can ask, "Why do you feel like you wouldn't be a yes even if your partner was a yes," type of thing.

Tad: Yeah, and what I love about the question of, "Hey, if $5,000 was there, would you do it? Or if your partner were a yes, are you a yes?" These are very honest questions, you know? You're kind of risking it all when you ask that question. Because they may say no. "You know what, even if they say yes, I don't know if I would." That's good to know.

In so much sales and stuff you're almost trying to never name the elephant in the room. You're trying to avoid talking about it. Instead of that, let's actually make sure it comes out. Let's find out what is the truth. "Oh, so if you had the money, you wouldn't. Okay, well then I think you're a no then. It sounds like this isn't the fit."

But you know, the thing I would toss in is a marketing piece here. If you get to the point of the conversation and they say, "I don't think I would," then I would just say, "You know what, I get it. It's not a fit. Thanks for being so honest. And here's something that would be helpful. Obviously there was something missing on my sales letter for this, or on the setup for this call, but you showed up. Again, it's not a fit and here we are an hour later just finding this out. So I'm wondering, would you be willing to give me some feedback on that?"

And they'll almost always have something I find.

Greg: Yeah, what would you have needed to know going into this thing?

Tad: I hear, "I thought it was this. I thought the call was about this, or I thought your program really helped people more with this. I thought the package included something else." You start to find out. And you can start to weave that into the marketing so that — and literally you redo the marketing material. And I would send it to that person and say, "What do you think?" Because I've done this before and gotten the response, "That's so great. I totally wouldn't have signed up."

That's success. Filtering those people out is a win. So even when it's not a fit, there is gold there that will help you filter better in the future. Brilliant. Yeah.

Greg: I have a question for you. Are we schedule for 90 minutes or two hours? I'm not sure.

Tad: 90 minutes. Yeah, I'll see if there's any last question in the group, any last comments. And if those aren't happening, I'll do a little recap. So Jana is just wanting to say something. So Jana, one second. I'll unmute you. And go right ahead.

Jana: Okay, thank you. Can you hear me?

Tad: Yeah.

Greg: Hi, Jana.

Jana: I loved this conversation. It's been really helpful and really empowering. So thank you. I appreciate it.

Tad: Thank you.

Jana: It's reminded me of something someone told me years ago when I was building my first business. She had bought a business and had a full client roster, so she never had to do any marketing. People would just call her up and ask to work with her. And she did capital campaigns for nonprofits. So she would work with people for about two or three years.

And she said that what she would do when she was on the phone talking to them was she would just ask herself, "Do I want to live my life with this person?" Do I want to get up in the morning and now I'm going to be having a phone call with this person today? Or several times this week. And I really love that. And she told me that when I had no clients or business in the beginning.

And it was really clarifying to me because I would have conversations with people and the answer to that for me was no. And even though I didn't have any other clients in the works, I would still say no and of course sure enough someone else would turn up. But I ended up with a whole roster of clients that I really loved from that and very few complaints. Hardly ever. And just people I love to work with.

It kind of fits into this because I'm realizing that was one of the things I did in those enrolment conversations, was ask myself that question. Do I want to live my life with them? Do I want to get up in the morning and think that I'm going to be talking to them and helping them live their life more beautifully and achieve their goals? Am I really aligned with that?

Tad: Amen. Thank you.

Greg: I love that question. That's a good question to ask yourself.

Tad: Yeah. Because it's so important to remember that we're filtering them too, you know. It's not just a one-directional thing. They're not just checking us out to see if we're a fit for them. Were also in that conversation checking them out to see if they're a fit personality-wise, vibe-wise. You know, can we really help them? It's a two-way street. And so much of the traditional sales stuff misses that.

So, Greg, if people want to work with you, if people want to get your help in digging deeper into this, I'm curious, where can they reach you? I'm not totally familiar with your packages, but I'm curious what packages you have that you'd like to talk about or that would relate to this conversation.

Greg: Sure, yeah. I'm happy to connect with people. The first thing I'd say is — this just came to mind — I have a PDF on kind of the most common concerns that might come up at the end of a conversation. And we didn't get to talk about all of those so obviously money and talking to your partner are two big ones. But I'm happy to send that along to anyone, just because we kind of didn't get through every possible concern. And I wouldn't have wanted to.

But if you need that as kind of a cheat sheet next to your phone as you have these calls, I'm happy to send that to you. You can email me, greg@gregfaxon.com or you can just Facebook me, just message me and I'll shoot that along. You don't have to opt in to anything if you don't want. So I'm happy to send that along.

If you want to discuss working together longer-term, in other words if you'd like my perspective, if you really want to get help with enrolment and the marketing pieces that come before that, and you're a coach, then the best thing for us to do is probably to have a conversation probably similar to this but more abridged because you've already had an experience with me and we'll talk more about what might be a fit for you.

But you know, at that point I'll be able to recommend a better package. I'm not sure who's on the phone right now. But my main program, kind of my signature offering is called Fill Your Client Roster. So if you're a coach who has worked with one, or two or three paid clients, you've worked with some paid clients but you don't have the number of clients you want and you're not making the income you want, Fill Your Client Roster is focused on getting people to that $5,000 per month mark.

And you know, I referenced it as we were talking about examples today. And obviously that's a significant investment and there's a significant return on the investment. So if you kind of feel like you want that next level, we go through all the pieces of your marketing and enrolment and really clarify your positioning in the marketplace so that when you get in a conversation with a client, you're the obvious choice for them to work with and you know what to do to help them step forward and move forward if they're a fit.

So I'm happy to talk about that with any of you. And the best place to go if you're ready to book that, and I'm happy to have that conversation complimentary with you, is gregfaxon.com/apply. And just like Tad does, I have an are you sure page there. So it has a few bullet points, just criteria that I'd like you to meet before we schedule a call.

But that will give you a sense of where you need to be for Fill Your Client Roster. And then you'll just be sent to my calendar once you click that button. And we can talk. So that's what I would suggest. If you're not quite ready to talk about an ongoing relationship and you just want the PDF, totally cool. And if you feel like you really want to double down and get more clients in the next say two or three months, the next program launches, the next round of it starts in April. So it's an eight-week program and like I said we go through all those different pieces of it.

Tad: Sweet. Well, Greg, thank you so much for making the time. Thank you everyone for calling in and listening in. And I hope you'll go check out his website too. He's got some great stuff on it. GregFaxon.com. And yeah, I look forward to connecting more down the road. And I hope everybody has a great spring 2017. Take care, everybody.

Greg: Thanks, guys. Thanks, Tad.

About the Hosts

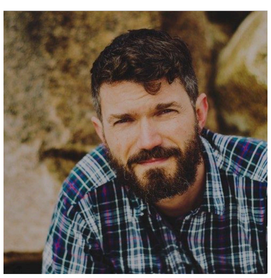
Greg Faxon believes that the biggest obstacle for most entrepreneurs is inside of their own heads. He wants to live in a world where those entrepreneurs have the support they need to become champions.

Greg is a business growth coach who helps entrepreneurs unleash their full potential. He is the author of *Don't Let The Fear Win: How To Get Out Of Your Own Way And Grow Your Business…Fast*. A former All-American wrestler and world-class Spartan Racer, Greg combines his love of peak performance with his gift for helping clients radically increase the impact and income of their businesses.

Greg is regularly spotlighted on Forbes.com and has been featured in Business Insider and Fizzle. His interview with Seth Godin has been viewed over 28,000 times on YouTube. He has also spoken at universities and conferences such as Occidental College and Camp GLP.

You can learn more about Greg at gregfaxon.com, where he explores the intersection of business and personal development. When he's not working intimately with his clients, you can find him by the Shenandoah River, walking his dog Scout or making guacamole with his partner Emma on the 80 acre farm property where they live.

To download a free chapter of his book and sign up for his free weekly newsletter, go to gregfaxon.com/download.



Tad Hargrave is a hippy who developed a knack for marketing (and then learned how to be a hippy again.) For almost a decade, he has been touring his marketing workshops around Canada, bringing refreshing and unorthodox ideas to conscious entrepreneurs and green businesses that help them grow their organizations and businesses (without selling their souls).

Tad does improv comedy semi-professionally, co-runs Edmonton's progressive community building network TheLocalGood.ca, founded streetcarshows.com, indigodrinks.ca, socialyogiyeg.com, and the Jams program of yesworld.org. He speaks Scottish Gaelic and helps to run novascotiagaelsjam.com, and is also a huge Doctor Who nerd.

Tad currently lives in Edmonton, Alberta (traditionally known, in the local indigenous language of the Cree, as Amiskwaciy (Beaver Hill) and later Amiskwaciwaskihegan (Beaver Hill House) and his ancestors come primarily from Scotland with some from the Ukraine as well. He is drawn to conversations around politics, history, ancestry, healing and how those all intersect.

You can learn more about Tad and his work at marketingforhippies.com and nichingspiral.com