

Introductory Session

The guidelines below provide a formula for not only offering an empowering introductory or complimentary session to a potential client, but if there is a genuine interest in life coaching, will inspire enrollment without ever having to “sell” your coaching services.

We don’t call the initial or complimentary session a consultation or discovery call. These terms indicate a call that defines the coaching process and assesses whether the coach and client are a good match. Rather than offering a consultation, offering an actual session where the potential client will receive valuable support is more inviting. Rather than the client thinking they are going to be sold something, they are going to have the opportunity to receive real coaching support. And it is guaranteed that people are more likely to sign up for more coaching if they *experience* the benefits of coaching than if they hear what the benefits may be in a sales presentation.

Because most people come to coaching with a specific goal they want to reach, the example below will be based on the coaching area of vocation, but with slight modification, the same formula can apply to relationship, finance, health, etc. The two main strategies in this introductory session are building a vision for the future and creating action steps to move in the direction of the vision.

A helpful opening question after small talk is complete is:

“What would you like to focus on today?”

Regardless of the answer to this question, at some point in the conversation after fully understanding the nature of the specific focus, the question can be asked: “How would you like it to be?” If the answer is relationship, one nuance to this process would be to determine what stage of relationship the client is in: looking for love, dissatisfied with love, or ending a love relationship. If it is the latter, then the vision of a partner will be faceless and nameless, and this might also be appropriate for the “dissatisfied with love” category.

Assuming for this example that the area of focus is vocation. The defining question can be:

How would you like your vocation to be ideally a year to two years from now?

The time frame may change depending on where the client is in the process of developing the specific vocation. If someone is going back to get a degree for this particular aspiration it may be a four- or five-year vision. Another wording that is quite effective is:

Paint me a picture of how you would like your vocation to be one to two years from now.

Let's say that the aspiration is to be a successful author and motivational speaker, and the answer is "I want my book to be completed within two years and already on tour speaking and doing book signings." At this point we want to help the client flesh out this vision as specifically as possible. The more specific and detailed it becomes, the more real the possibility of it will be for the client, and the more excited they will get about moving toward it (and by the way, wanting you to support them because you are the one helping them make it real). For some clients the vision will become very specific and for others it will be more general depending on where they are in the process i.e. haven't started the book, are half way through, or almost completed. Regardless of the stage, we want to make it as specific as possible, and the easiest way to do this is to think numbers with questions like these:

What do you want this book to do for you?

How many copies to you want to sell, ultimately? (Hardly anyone has actually thought about this one before.)

When you are a motivational speaking, how often do you see yourself doing speaking gigs?

What types of audiences are you speaking before and how many are in attendance?

What else are you doing as part of this vocational vision?

Are you offering workshops and how often and what kind of workshops?

How many people attend these workshops?

Are you teaching classes and what kind?

How many people attend the classes?

What about retreats?

How many people attend the retreats?

Do you work one on one with people?

How many one on one clients do you see in a week ideally?

It is likely that most clients won't need to be asked all these questions, they may already have some ideas about their vision that they will share without having to be asked. But most clients will not have thought about the numbers questions, which again, serve to make the vision more real and exciting.

You may notice that I phrase these questions in the present tense. This also helps make it real for the client, and if you switch to future tense, always use the word "will" and never "would". "What types of workshops would you be offering?" denotes doubt. "What types of workshops are you offering or will you offer?" both denote certainty.

The last question to ask for the visioning is something like:

Let's include other aspects of your life in this vision of your future (and then name the areas that haven't been covered) such as: relationship, family, friends or community, health, fun, travel.

This is exceptionally important, because it allows your client to tell you what is really important in their life. Fleshing out these other areas will add value to the session and again increase your client's interest in future coaching. In a way, this serves as both an intake interview and an empowering initial coaching session.

The next question leads us into action steps. It is best to ask open ended questions allowing the client to create their own action plan, and then the coach can add in options not formulated by the client.

What are the obvious first steps to move in the direction of this marvelous vision that you have created?

With action steps, it is important to make them measurable, inviting, and exceedable, a word I have coined for this purpose. So, if a client says "I want to write an hour a day every day," I will ask "How often have you been writing?" Often the answer will be rarely or not at all lately. It may be a jump to go from rarely to an hour a day. I then engage in dialogue something like the following: "Let's say your intention is to write every day, but your commitment is a *minimum* of a half hour a day four days a week, or *you* come up with the numbers that will be inviting and exceedable. How will it feel if you say a half hour four days, and you actually complete an hour sometimes or five or six days, compared to committing to an hour seven days a week and barely meeting or falling short of that intention?" Creating action steps that are inviting and exceedable place your client in a position to succeed.

Here are some possible action steps from our example scenario:

1. Write a minimum of a half hour per day four days a week.
2. Spend one hour per week researching venues for which to speak.
3. Contact a minimum of five venues per week offering speaking services.
4. Spend a minimum of two hours per week developing website content.
5. Find and attend a toastmasters meeting.

The second to last question to ask in the action step process is similar to the last question in the visioning process:

Are there any other areas of life that you would like to create an action step for that will raise the quality of your life, such as health, relationship, spiritual practice, finance, or anything else? (Very important to name the areas.)

Some of these might have already been addressed with action steps that came out of rounding out of vision, but it is still worth asking for the areas that might not have been covered. Additional action steps might be:

1. Explore dating sites and create a profile within the next two weeks.
2. Spend three hours of quality time with children each week.
3. Meditate a minimum of fifteen minutes a day four days per week.

The last question is the most important of all. I ask this question of virtually all my clients every single session where action steps are created, and it is an essential component of the introductory session. It allows the client to experience the potential that will be realized as a result of taking the action steps:

What will it be like, how will you feel, when you have completed these action steps at 100%?

The answer to this question can be a driving force behind a client being motivated to enroll in your coaching services. The answer is usually something like: “I will feel great!” or “I will finally be on track with my mission.” Or “I will feel relieved.” Something highly positive. If the answer is not enthusiastic, it may mean that the action steps are not inviting and exceedable. If they look over the list and think that it is going to be difficult to accomplish, they will not be enthusiastic, because in the back of their mind they will know that they likely won’t succeed. When they look over the list and see that they are very doable and in fact inviting and exceedable, they will be convinced that this life coaching thing is really valuable.

If your potential client is at all inclined to sign up for life coaching, they have already been sold on your services without ever having received a pitch. Now you can simply offer your pricing. This is how I word mine:

“So, let me tell you how I work in case you would like to do more of this. When I charge by the hour, the cost is \$250 per hourly session. When I do a series, which is a minimum of one session per month for three months, the price is \$150 per session. If there is a question about the finances, on a sliding scale I will come down to \$120 per session or \$120 per month. I occasionally scale lower for special cases.

I only offer the latter to clients that I sense can really benefit from the additional discount. Regardless of the value you place on each level of cost, it is important to have three numbers and to always present the largest number first. The first and highest number confirms what the client has already considered: That this service is of high value. Then when they hear that with a series the cost is substantially more gentle on their budget, they can feel that they are getting a real value, and when they hear the third number if applicable, which is somewhere close to half as much as the first number, it’s a value that they cannot refuse if they are a likely coaching candidate. And by the way, if they are not a likely candidate, you don’t want to sell them on your service, because it won’t be a good match.

Another common practice is to offer the lowest number if they sign up today, right in the moment. The reality is that if a potential client says they want to think about it, it is very unlikely that they will sign up later. After all, right now is when they are in the energy of the vision and the plan. I don’t use this strategy personally, because it is a little manipulative. It uses fear motivation to get them to sign up right away. I know I could sign up slightly more clients using this strategy, but frankly I don’t want clients

who are motivated by such tactics. I only want the clients who clearly see the value in my services without having to be convinced. Occasionally someone will say I want to think about it, and they are enthused enough that I will offer to set up a time (10-15 minutes) to talk in a week or two to check in on their action steps and decision.

If I feel the potential client is on the edge and someone I truly would like to work with, I sometimes will use the following final question after describing the cost:

So do you want to think about it, or do you want to do it?

It's subtly asking if they want to be a thinker or a doer, and it can inspire them to be bold enough to commit in the moment.

I'll add here that I generally encourage clients to go with a monthly frequency. I like to make it as easy as possible for people to say "yes." And a monthly frequency is more affordable and ultimately more sustainable for most clients, and I would much rather have a client at once per month for ten years, than two or three or four times a month, for a few months.

In using this formula, I find that better than 70% of complimentary coaching clients will avail themselves of additional coaching. And I would say about 30% of those who do a follow-up session will sign up. Mind you, virtually all of my clients come from speaking engagements and events, and not from social media marketing. The conversion rate would be much lower I suspect if the comp sessions were with social media prospective clients.

If you'd like a complimentary coaching session to explore the benefits of in-person client attraction (which takes way less time and energy than social media marketing) or on any other subject, be sure and let me know!

All in love and Joy!

Patrick J. Harbula DD, MLC