



Module 13:

Enrolling Clients

C.O.N.V.E.R.T. Model

Enrolling your first clients can be an exciting if not intimidating process. But what do you do when someone contacts you to motivate their interest into joining forces with you as their coach? The following model offers insights and guidance on some of the most common blocks to clients saying yes to you and to themselves!

Let's begin by looking at the core elements of an effective enrollment conversation as they relate to the psychology of sales. This model is from our CoachPreneur Academy Business Incubator program.

Connect
Obstacles
Needs
Value
Evaluate
Reveal
Trust



Build an Authentic Connection

Connect: Authentically connect with your prospect

The #1 priority throughout your client enrollment conversations is to genuinely connect with your prospective clients. Be yourself; there is no one else like you. And that's exactly why you'll make the ideal coach for those who need you most!

Pause for just a minute. Think of a time when you felt uncomfortable in a conversation. How about a time when you didn't want to offend or appear in a negative light? If you've been in this experience or seen it in others, you're probably also aware of how those feelings of discomfort affect both verbal and non-verbal communication.

In some, this discomfort comes out as over-excitement, nervousness or neediness. For others, it compels them to have all the answers – all in an effort to impress a potential client.

Obviously, none of these examples are what you hope for when attempting to market yourself and your services. That's why the best way to connect with your prospects is to be who you are: someone who is in service to others at the core. Stay connected to why you do what you do. It will help focus your mind on what truly matters beyond the sale.

What might this look like?

- **Be Honest:** Your prospect asks you a question you don't have an answer for. Instead of winging it, let them know you don't have the experience or knowledge they are looking for right now but are willing to explore it further on your end. Maybe it really isn't important that you are an expert in the topic they want to be coached on?
- **Be Real:** Your prospect asks you about your experience with what they hope to achieve. Instead of just telling them your success story, tell them the whole story, including the trials, tribulations and triumphs.
- **Be Yourself:** Instead of dressing, acting or portraying yourself as someone trying to impress, show up as who you are – no more and certainly no less!

Identify Obstacles Upfront

Obstacles: Identify potential obstacles

Your goal is to learn from your prospective client throughout the enrollment process. This ensures your questions and responses are in direct alignment with who they are and what matters most to them.

When you pay attention to their heart's desires and what their head needs to know logically to make a decision, your responses put them at ease. This happens naturally when you exercise your active listening skills and stay connected to what is top of mind for the client.

For example, while your client may be deeply passionate about changing careers, it's likely they still need to feel they're making the best, most practical decisions to get there. What that "sounds and feels like" will be unique to each client and their personal way of making decisions. For one person, that might be to know that their coach has the right kind of process for their learning style. For another it might be all about the rapport and trust they feel.

Remain present and curious. As you identify obstacles, be sure to build confidence with your prospect by addressing them.

Two obstacles that can stand in the way of your enrollment conversations include:

- Your prospect's past experience
- The investment required to make change

1. Your prospect's past experience

Your prospective client may have barriers and/or beliefs that have prevented them from making their desired changes. Now these barriers and beliefs may have turned into "believable" reasons as to why change isn't possible for them. As you briefly explore what they've attempted on their own or with other support professionals discern what barriers or beliefs you'll need to address to help them trust in investing in another solution – you! Acknowledge any feelings or concerns about their past failures. Then assist them to see how working with a new person and process could be not only be different but beneficial.

Example Questions:

- What have you tried already before talking to me today?
- What was the outcome of that experience?
- What were you expecting from your past experience that you did not receive?



Identify Obstacles Upfront Cont'd

- What other ways could that experience have been better or more productive for you?
- What do you feel I need to know about you or your situation to best answer your questions today?
- What do you feel is critical in your next coach? Or solution?

2. The investment required to make change

Typically, you'll hear these barriers/beliefs as objections related to the time, money and effort required. Note: The problem isn't always what they say. What's underneath that excuse? That's what you're really listening for.

In authentic enrollment conversations, the goal isn't to pressure people into the sale. Your mission is to educate them into the ideal mindset and realization that the services you offer are designed to help. As you listen for potential barriers, be prepared to establish how you and your process differ. Alternatively, you may be "lightly" coaching them around any limiting beliefs to help them see beyond their current reality.

Remember: you aren't trying to overcome their objections. You're helping your prospect overcome them on their own. This is where your powerful questions come into play. They serve to orient the client as to what is possible for them with the right kind of support.

Example Questions/Responses:

- What does your ideal future look like? How does that feel, knowing it could be your future? What is that worth to you? What do you feel you need to make that happen?
- I understand the busyness of life. But how will that change unless you initiate it?
- How could I best support you?
- Yes, I understand this in an investment. We could talk about payment plans if that would be helpful? -or- What is at risk if you do nothing?
- Working an extra hour or two into your week to achieve your goals can be tough. But imagine how much better your life can be, not to mention the lives of those around you, when you learn how to focus on the issues that matter most to you.

Identify Obstacles Upfront Cont'd

- This process is about you; it's tailored to your needs and wisdom. Your life can be completely different when approached from a holistic point of view – that's what sets Whole Person Coaching apart from every other self-improvement process. It's about you!

Listening is the key. Your goal is to elicit as much information in as short a time as possible. Use your backtracking and reflection skills to ensure the client feels like you truly get them and their situation. Another effective option is to use bottom-lining techniques to move the conversation forward. This shifts the focus from their story into potential solutions... with your support.

Don't coach them around their problem. Simply listen, learn and move the conversation forward by focusing on what they need to see, hear and feel to say YES to getting coached for their problem!



Identify Needs (Their Language)

Needs: Identify what the client truly needs from you and the process

In the same way you listen for what the client believes is the problem, you also want to listen deeply for what they feel they need.

Two types of needs will shape your enrollment conversations:

- What your prospective client believes they need in terms of support from their coach and the coaching process
- What your prospective client believes they need to accomplish their goal outside your support

As you hear what they need, reflect back those needs and build upon them with how your “way” might be the kind of support they are looking for.

Example Questions/Responses:

- As I’m hearing about your current situation, it sounds like your ideal coach would be able to help you with...
- From what you’ve just shared _____ (their needs and desired outcome), it appears to me that you could really benefit from a process such as the one I offer. Would it be ok if I shared a little bit about how I work with my clients? Or might there be other information that could be useful for you right now?
- It really sounds like you’ve tried a number of things. Would it be useful to talk about how I work with clients and the process I use to accomplish _____? (their goal)
- I’m hearing you need a different kind of relationship. Perhaps one where accountability and a stronger support system right from the get-go might be valuable? How does that sound? Would it be useful to explore what working with me might look like?
- I love how clear you are. You know yourself well. I’m hearing _____ (their needs). Would you be interested in learning more about how my coaching process works to see if I might be a good fit for your needs _____?

Show Value vs Tell

Demonstrate value: Paint a picture of their future

If you've ever taken a writing class, or attended school at any point in your life, you've heard the cliché: "show, don't tell." The reason it's so oft repeated is because it is one of the surest (and only) ways to stir interest, relatability, empathy and the resulting buy-in.

Imagine for a moment that you are a prospective client. A coach you are considering presents you with the following two success stories:

Story #1: Telling. I recently had a corporate client who lacked the courage to speak out for herself. She came to me hoping to find her voice and increase her profile within the company. Like you, she was looking for a raise and a more prominent role worthy of her talents and experience.

As a Whole Person Coach, I was in a unique position to help her emerge and step into the whole of who she was. Through powerful questioning and other tools, I helped her tap into her greatest strengths and deepest potential. The insight we uncovered together gave her additional information that moved her past an outdated story largely responsible for her self-sabotaging patterns. This new self-acceptance also empowered her to become more aware of the information carried by her emotions, physical senses, and social and spiritual connections then leverage it effectively.

The result? She expanded her mind-space to achieve a more positive focus, making tremendous strides in both her professional and personal life. She discovered it was time to change employers. And she did it without a lot of the stress that often accompanies change of this nature.

OK. This is more akin to a blueprint for change than a true success story. As coaches, we can scan through the various tools mentioned here and piece together, at least in part, what may have been going on with this coaching client. But it still leaves us in the dark as to what really transpired. Now jump back into the shoes of your prospective client. This individual may be working with a coach for the first time. Concepts like "powerful questioning," "self-acceptance" and "mind-space" may represent complete unknowns. At the very least, they will be unfamiliar with the difference between Whole Person Coaching and other forms of the practice.



Show Value vs Tell Cont'd

This example would almost certainly get a “no.” And the reason is simple: there’s nothing personal or relatable in this story about a highly personal service.

Now let’s look at the second example – one that has been painted to illustrate the coach’s service and specialties.

Story #2: Showing. I recently had a corporate client who came to me because she felt she was lacking the courage to speak out for herself. She was intimidated by her more vocal colleagues, many of whom had started out in positions beneath her yet were now advancing beyond her. It left her feeling undervalued and disengaged. But together, we discovered there was a lot more under the surface that was responsible for her feelings of insecurity.

For privacy sake, let’s call her Kate. Kate worked for a medium-sized boutique branding agency here in Portland. They specialized in marketing for mobile tech companies. Kate started out as a brand marketing assistant, right after receiving her degree. She had been promoted, but not as quickly as some of her counterparts. In creative meetings, she often felt like her ideas were sneered at and viewed as cliché... especially after one of her more competitive coworkers said so in front of the entire group and mocked her references to “old, boring print campaigns.”

See there’s a catch with Kate: she was almost 10 years older than most of her peers. Kate had taken a gap year after high school, which turned into five years before she realized it. She found opportunity, friendship and eventually a husband while working as a barista in a local coffee stand. As she logged her hours at the shop, one of only three stores in the area, the CEO recognized Kate’s talent for layout and design. He eventually allowed her to create some of their print advertising and a design for one of the mugs they sold.

It inspired Kate. She wanted to pursue a career in tech and design with a focus on digital media. Kate’s dream had always been to create the ads she saw online and in magazines. Now was her chance.

Her husband, an apprentice glazier (someone who installs glass) was skeptical. He questioned her choice and the cost involved at that point in their young lives. Her husband was also ready for a family. Nevertheless, he supported her decision and helped rein in the expenses to allow her to go to school full-time.

Show Value vs Tell Cont'd

All that to say, Kate had worked hard to get where she was. She'd sacrificed quite a bit. Kate put having a family on hold, something important to both her and her husband and that had been pretty much agreed upon early in their relationship.

Though still married, Kate felt a rift had emerged. She was working long hours and taking work home to get ahead. Her husband was taking on extra jobs in an effort, she believed, to avoid coming home.

Kate felt she had lost his support. She felt persecuted and discriminated against at work (ageism at 30, seriously?!). Sleepless nights, a loss of appetite and emotional exhaustion began to take their toll.

She met her old boss from the coffee shop for lunch one day and he could tell she was struggling. What tipped him off? She started to cry at the table. That's where I come into the picture.

Kate's former boss had worked with me a few years before to fine-tune some of his interpersonal skills and align more with the type of manager and business owner he wanted to be. He gave her my number and offered to pay for the first three sessions.

I'll be honest: it took three or four sessions before Kate really began to trust me. The negative feedback she'd been receiving from just about everyone in her life had caused her to build a wall around her true thoughts and feelings. She was trapped in a story that was telling her she was too old and had missed the boat – both in her career and her opportunity for a family.

I used a process in Whole Person Coaching we call "Radical Clarity" to help Kate overcome her self-sabotaging patterns. The insight it generated allowed her to take a step back and bring the wisdom of her whole self into the picture. In other words, Kate identified what mattered most to Kate. As a result, she aligned her next actions accordingly.

I can tell you that Kate is still a client of mine. But she no longer works at the boutique agency. In our sessions together, Kate got to a place where she has achieved a noticeably higher degree of self-acceptance. She is a professional woman in her 30s – that's life. But rather than view it as a disadvantage, she now sees the additional experience she brings to the table. She leveraged this experience to jump into a new position as a senior designer and art director for a large internet marketing company.



Show Value vs Tell Cont'd

The new job pays better, has better hours (no work to take home) and even has a shorter commute. Her husband, who it turns out was working longer hours to take some of the pressure off her while she pursued her new job, has also been able to cut back on his extra jobs given the bump in Kate's salary. Next month, they're unplugging from their careers and taking their first big vacation to explore Europe for three weeks.

It's one thing to offer self-actualization and fulfillment. But what do those non-specific terms mean to your prospect personally? Appeal to the heart and senses. Then lean heavy on the results that were made possible by your partnership with the client.

Notice anything else? When you "tell," the story is largely focused on the coach. When you "show," the client naturally takes center stage. In this example, there was a lot of detail. Perhaps too much for a sales conversation, but maybe not.

Facts and figures. Using data can also be a real advantage to show value. For example, you might speak about industry facts and figures published by the ICF. Something like, 'by the end of three months, most clients have accomplished 70% or more of their goals'. Data from your own research working with your clients is even more powerful. It directly addresses your ideal client!

During your conversation, considering sharing...

- The benefits others have received
- What they now have as a result of working with you
- What they are now able to do that they couldn't before
- Who'll they become as a result of working with you
- How they felt as a result of your coaching services
- How you saved past clients time, money, and/or effort

Evaluate! Evaluate! Evaluate!

Evaluate your process often!

The biggest mistakes salespeople make are not being present to three things:

1. Their prospective client
2. The process
3. Their part in shaping the outcome of the conversation

Another mistake is not learning from their mistakes. Don't let that be you.

Periodically reevaluate your enrollment process. No sales pitch is ever perfect. As our societal values and priorities change, so too do the means to address them. That's why you invite the prospective client to help you learn as you go. You begin learning during the sales process and continue to learn after, should your prospect decide to go elsewhere.

Use strategic questions to gain relevant information and shape the conversation based on what you learn. For example:

During the client enrollment session:

- How am I doing right now?
- Are you getting the information you hoped for?
- What else do you think would be helpful for me to share?
- As I've shared all this information, what is coming up for you?
- Do you feel we're on track with what you were hoping for or is there something else you'd like to discuss?
- OK, I've just shared my entire process and introduced you to several of my past clients (and their wins). How are you feeling about your decision to invest in yourself?

As you help them help you, they'll feel more in control and less guarded that you are trying to "sell" them. This process also demonstrates you have their best interests in mind.

Receiving a "No" in response to your client enrollment session

Don't be afraid to ask for feedback from people who decide not to enroll with you. Yes, it's scary. But evaluating your process during and after sessions lets you finesse your process!



Evaluate! Evaluate! Evaluate! Cont'd

A “no” doesn’t mean you’ve done something wrong. Coaches and their clients require a specific fit. There’s a good possibility that a “no” can result from someone who simply needs a different personality type or perhaps isn’t ready to be coached by anyone at all. These things can be hard for people to verbalize or admit sometimes. If they found a better coach for their needs, trust that they are in the right place, and so are you.

But when you get hit with a “no,” don’t simply walk away. Follow-up with, “Thanks so much for letting me know your decision...”

- Would you be willing to give me a little advice on what specifically you were looking for in a coach?

Remember: one person’s feedback doesn’t mean you should change your process. However, recurring patterns might. Years ago, a prospective client shared with me that although my pricing was a bit high, they would have jumped to work with me had I been able to support them sooner than later. I had a waitlist of about two months at the time. Could I have snuck them into my schedule? Maybe.

Another prospect shared that they really wanted to try working with me first to see if it was a good fit, as opposed to committing to a full coaching package. Viola! That’s when I birthed a Power Shot session!

It’s a one-time coaching session that lets people test-drive the process and then decide if the power hour (paid, of course) was enough or if more is needed.

How to pivot from “no”

Let’s say for example that you are a small business coach who specializes in startups. You are an entrepreneur yourself with a 15-year track record and two thriving businesses (which you’ve since sold).

You are now passionate about building up the next generation of business owners. So you’ve earned your ICF credential and paired it with your business expertise to coach those preparing to open their first venture. In this scenario...

Shelley comes to you for help with her new gelato store – one that will handmade all their ice cream in-store. You pitch your expertise, and how coaching makes you a valuable asset for those who want to self-innovate. But you get a “no” at the end of the meeting. What gives?

Evaluate! Evaluate! Evaluate! Cont'd

A “no” doesn’t mean you’ve done something wrong. Coaches and their clients require a specific fit

You ask Shelley for a little more information, specifically the things she expected but is not seeing with you. Turns out she was looking for a business consultant to do the heavy lifting rather than someone to help her figure things out on her own. Simply not the right fit. As frustrating as it may be, she isn’t really looking for a coach.

- Mike asks for help launching a private contractor IT business that will support small to midrange businesses with on-call IT services. Specifically, he needs help developing confidence when approaching others and talking about himself and his abilities more persuasively. One of your previous successes was in the tech sector as a mobile app developer. You also have firsthand knowledge related to what small business owners need from IT support – something those in larger companies simply take for granted. You’ve helped more than a dozen other techrelated companies streamline their processes to cut costs and get to market faster. But Mike still gives you a “no.” What!? You were born to do this!

You follow up with your questions to learn more. Turns out Mike is fresh out of college and faced with a mountain of student debt. Unable to even qualify for a small business loan, he’s reliant upon savings and family for his startup capital. It’s not just an excuse this time: he really can’t afford the fees (fees you rightfully deserve!).

Maybe rather than coaching him one-on-one, you add to your services a “Newbie Business Group,” in which you work with multiple individuals at a lower rate than your private coaching sessions. This allows you to earn your desired hourly income while helping those who need you most yet may not be able to afford the one-on-one time. Delivered online, you not only fill your sessions, you also introduce Mike and the other participants to a built-in system of ongoing support – support that doesn’t cost you a dime yet provides tremendous added value to Mike and those like him. Or maybe you discover that the best coach for Mike is someone focused on confidence and selling versus your area of expertise.

The point: learn and use the information and feedback you receive to grow your sales savvy as opposed to taking it personally.



Reveal & Surprise Them

Cultivate urgency with a reveal

A reveal is an unpredicted “special opportunity” woven into the enrollment conversation at a time when the client is on the fence to invest in your services. It’s a way of creating urgency during the conversation to motivate the client to make a decision.

For some, this can feel extremely salesy. That’s because it is. But it’s also a time-proven, highly effective method to get someone to say “yes.” More important, it’s a way for you to see if someone is really serious or if it’s time to “let go” of the prospect and move onto a warmer lead.

Here are a few examples of “reveals”:

- Time-Based Discounts – “Sign-up before X date to receive Y discount”
- Limited Quantity Discount – “Be one of 10 people to receive this exclusive offer...”
- Bonuses – “If you sign up for _____ program, you’ll also receive: _____”
- A Special Payment Plan

While it’s not always necessary to “reveal” a special, it will certainly catapult your sales. Think about

Trust is the Glue

Cultivate self-trust

Once you get the feeling that you've built trust with your prospect, you're well on your way. But you're not there yet. Trust is often not enough on its own to transform someone from a warm lead to an enrolled client.

Yes, your #1 priority is to connect with your prospects and show them that you get them, the uniqueness of their situation, and that they aren't alone in what lies ahead. But once they trust you, you have to elevate the conversation to an even higher level: you must now help them have faith in themselves, confident that they are truly making the right decision.

While this may seem obvious to some, it's often the biggest barrier for people to invest in coaching.

They can't "see" the future. That's because what you're selling isn't sitting on a shelf or parked in a lot.

Here are a few ways you can help them do that:

- Work through any beliefs around their failure to succeed in the past
- Prepare them to "have the conversation" with any stakeholders like husband, wife or boss (as necessary)
- Offer a money-back guarantee if they feel like the coaching isn't right for them. (Just be sure to include a policy that defines what is expected from them as a client. For example, they are required to show up to all sessions and complete all assigned/agreed-upon homework. That way you are asking them to participate.)
- Share your success story – focus on the before (your trials and tribulations) and the after (what you overcame to be sitting before them in your position as coach)
- Offer a few client success stories (if you haven't already)
- Invite them to speak to a few of your past clients

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