Replicate

Sample Transcript of a Monthly Training Call with Coaches-in-Training

Profit Advisors™ Certification Program

NOTES FOR PRACTITIONER TRAINING CALL

"Your First Meeting with a Client"

WELCOME

Hello, Everyone. This is Janet Switzer. I want to welcome you to a very important training call where we'll be talking about how to advise clients on establishing revenue-generation systems within their business. I'm talking about the work you'll be doing at the monthly meetings with clients throughout your year-long consulting relationship with them.

Up until this point, you have marketed yourself to potential clients. They've scheduled appointments with you to review their income opportunities in their business. You've conducted a 35-point assessment with a prospect using the online calculator, you've signed them as a client and you've conducted the new client interview to gather substantial data about their operation and determined which of the 7 systems they need to put in place immediately.

At the same time you conduct that new-client interview, I'm suggesting that you also schedule the very first in-person meeting with your new client while their enthusiasm is high. You also want to make sure that you've gotten the 12-month client engagement letter—or contract—back from them along with their first payment before starting your consulting work.

Part of the engagement is to give them a copy of the home-study course – ask if they want more than one copy, perhaps for management to have their own versus the staff. And we can ship those copies to you at $235 – suggested retail if you're going to sell it to the client is $470 – but you have discretion to sell it at whichever price you like. We have previously sold this course online for up to $797. In the short term, email us with your requirements and we'll send you payment and shipping instructions.

WHAT TO DO WHEN SCHEDULING THE FIRST MEETING WITH A CLIENT

You should give the client instructions *ahead of the* meeting to read the related section in the 3-ring binder and any other related documents such as the marketing and advertising copywriting course.

You should have also determined with the client who else will be attending the meeting—perhaps their marketing director, their salesperson or sales manager if they are that large. Whoever will be doing the work of getting these systems up and running, along with the business owner or principal who hired you.

So now you're ready for your very first meeting with a client. I recommend that you budget 90 minutes for your first meetings until you determine who long it takes YOU to go through the material with the client. You can make adjustments as you get more familiar with these modules and the client meeting process.

THE FIRST MEETING WITH YOUR NEW CLIENT

So what do you do when you actually sit down with a client team and the introductions and initial greeting is over?

This is where you'll do the work of teaching them about a system and helping them create an implementation plan for establishing that system in their business.

For the purposes of today's call, I've sent you the module that I believe most of your clients will need to start with – and that's the prospecting and lead generation module or Module #1. This module will immediately address the question for most business owners: "How can we find more customers?" That's the most common complaint we hear from business owners. So I'm using this module as my example for today's call.

Because there is a lot of work to be done to establish a prospecting and lead generation system, we've actually split this system across TWO months. Some of the systems are like that—they just take more time.

In this case, the first half of the prospecting and lead generation system—month #1—deals with determining offers and prospecting campaigns. The second half a month later deals with scheduling an annual calendar of prospecting and lead generation campaigns. So month one—figure out the campaigns. Month two—schedule the campaigns. Very sequential.

So let's talk about the first half.

I emailed you the three items that make up Module #1 – a PowerPoint presentation, a set of facilitators notes, and an implementation guide. These three items will be always included for each of the 12 modules you'll be working with—a PowerPoint presentation, a set of facilitators notes, and an implementation guide.

So let me go through each of these and talk about how they should be used at a client meeting.

ANATOMY OF A MEETING WITH A NEW CLIENT

The first part of any meeting should always be presentation of the PowerPoint slides. And while I'm talking about these presentations in general, it would be helpful to open the PowerPoint file I sent you as a reference for our discussion in just a moment.

Many of you will be likely presenting this from your laptop at a client meeting, unless a client has a conference room with a screen or some other monitor. So be sure to ask about the technology of their meeting room at the time you schedule the meeting. Most small companies simply don't have those sophisticated meeting facilities. And there's nothing wrong with that. If you would like to bring a lightweight flat-screen with you to hook up to your laptop and present, that's great, too. It will be much appreciated, I'm sure.

Also notice that you can customize the footer of each slide with your name and logo—you'll need to go to the master slide to do that.

So the first part of any meeting should always be presentation of the PowerPoint slides. The reason for this is two-part: (1) it always starts with a goal for the meeting and the work over the coming month, and (2) that there is a review slide in most all of these presentations that helps you recap what the team worked on last time. You don't necessarily need to do a complete review BEFORE the PowerPoint unless you feel there's lots to review. That said, Module #1 does NOT have a review slide, however its follow-up module about the annual prospecting calendar <u>does</u> have a review slide.

So the PowerPoint is designed to teach the group the fundamental aspects of the system they're about to work on establishing. It's not meant to be a college-level course, because hopefully they have already read the systems manual ahead of the meeting. This PowerPoint should be a focusing tool to get everyone in sync with the major aspects of that system and the work to be done during the meeting. That's the purpose of the PowerPoint.

As a Profit Advisors consultant, you should have reviewed the section in the manual and be familiar with the system you'll be talking about.

And by the way, you'll notice this entire module is dedicated to prospecting and lead generating OFFLINE. Using the Internet to find new customers is contained in another module.

So let's turn our focus to the PowerPoint itself. Please notice that there is a script below each slide when in Normal view. If you would like to use that, it's timed to produce a presentation of about 25 minutes. As you become more familiar with the modules and doing client meetings, you can embellish this script, but it is something to get you started.

Notice that it starts with today's goal. I think this makes for a much better title slide because it shows the group right when they enter the room that you are here to help them achieve defined goals. This is a working meeting with a defined goal. So far, so good.

The next slide after the goal, will always be "What You Will Learn and Do Today, and Over the Next Month." So it sets the agenda for the meeting and for their homework assignment. It also communicates that you're not going to be here for the next 12 hours doing all this work for them – they're going to do a lot on their own.

The next slide describes the purpose of the system in the business and begins tutorial information about that month's system. In the case of this prospecting and lead generation system, it talks about a unique style of campaigns that you want them to use—that is, direct-response style advertising. This is discussed extensively in the manual so I'm not going to go into a lot of detail about it here, but this PowerPoint <u>is</u> designed to hi the high points of direct-response – that is, those elements that are really necessary such as an offer and a call-to-action.

It tells the client's team that compelling offers should be the focus of their prospecting, advertising and marketing campaigns.

The next few slides in this module (slides 5, 6 and 7) focus on the target market for your client's products or services. You will have to gauge in advance how sophisticated your client team is in terms of generating prospective customers, but many small companies use a shotgun approach to find customers—they don't know that much about their target market, or have never thought about how to hone in on reaching these prospects specifically, or they may have a general idea of their target market but have not thought through the specific target market for each of their products and services—because the target market can differ by product. So these slides get the conversation going about the ideal buyer and helps the group determine the best prospecting campaigns to use and how to write the marketing copy they contain.

At Slide #8, we move on from the subject of the target market to ways that the client team can communicate to these potential buyers in a compelling way. You may remember the term Unique Selling Proposition from your review of the big 3-ring binder we sent you—that's the Systems Manual. So this slide covers that.

There will never be anything in these PowerPoint presentations that's outside of the reading you've already done. No surprises here. And probably not a lot of surprises for your client team if they have done their homework and read the material in advance.

The final tutorial information in this PowerPoint is on slide #9 where you'll talk about the different kinds of offers that your client's team could make in their prospecting and lead generation campaigns. Be aware that this may bring up some brainstorming about different offers they could use for different products or different times of year—which is great because that's the work that you'll be doing in a few minutes anyway.

All these offers are described in the big 3-ring binder, the Systems Manual, but also, we've got that script below each slide to briefly describe these offers and direct the client to the proper page in the manual. Hopefully, they've got the manual sitting on the conference table for reference. If not, you should bring yours just in case. Although the prospecting section is also included in the Facilitators Notes which I'll talk about in few minutes.

Slide #10 talks about the work you'll do with the team around the conference table at that meeting. It sets up the working part of the meeting. The top of Slide #10 has a little review of what any company needs to do in order to prospect effectively and that is: **To establish a Prospecting System, you must first decide which products and services to promote…to which target markets…using which kind of offers and marketing devices.**

Surprise, surprise. That's what you're going to be doing for the rest of the meeting.

Again, the script below each slide really builds a case for why this work is needed.

USING FACILITATOR'S NOTES AT A CLIENT MEETING

Of course, the PowerPoint presentation is just the first portion of the meeting. There are a number of things you should be accomplishing at each meeting and those are listed and described in the Facilitator's Notes or Consultant's Guidelines. So please find the file called ADVISORS-1-FacilitatorsNotes.pdf. This was a particularly large file, so we put it online and gave you a link to it in our reminder email about today's call.

If you need to access that file online while you're listening, please go to: [LINK] *

* To view this file, please see "TRAINING YOUR PEERS: Sample Facilitator's Notes for Working with a Client" in the Replicate Peer-Certification module where you found the document you're reading now.

Right on page 1, there's a headline that reads: This Client Meeting should include." You'll see all the activities listed there which we recommend that you facilitate, starting with the PowerPoint and followed by—in the case of today's example, Module #1—a brainstorming session on **creating campaigns for your 3 most important products or services. A good time to start that brainstorming session is with Slide #10 of the PowerPoint.**

Notice in the Facilitators Notes that it calls for completion during the meeting of Pages 3-5 of the Implementation Guide which are worksheets for facilitating this brainstorming session. I'll get to those in just a moment.

As a final task of the meeting, you want to leave your client team with the homework assignment of creating actual prospecting campaigns for individual products and services. During your time there, you want to step them through the process of thinking through and planning a campaign—that's how they'll learn-by-doing. Then leave them with that work to do on their own for other products and services their company sells.

These Facilitator's Notes we've provided are meant to be printed and taken with you to the meeting so you can stay on track with the work that needs to be done onsite with your client.

In the case of Module #1, we've included a reference list of the types of campaigns described in the big 3-rin Systems Manual so you can quickly find them if your clients have questions about display advertising, direct mail and so forth. You can also refer to those pages if questions come up about different types of offers—either straight-sale offers or two-step offers.

Also in these Facilitators Notes are the script for the PowerPoint presentation, slide by slide—as well as, an explanation of the homework assignment you'll be giving your client team.

We've also included a copy of the Implementation Guide for this month. Part of your work as a consultant is to teach but also to facilitate the completion of an implementation plan so the client team knows exactly what to do over the next month to get this prospecting system established and operating in the business. Well, what is the system? It's a well-defined schedule of planned, repeatable marketing and advertising campaigns, targeted to a specific market or niche market, that contain compelling offers, a call-to-action and provide enough information to pre-sell the reader or listener on buying the product or service featured.

Unlike the random, non-specific, non-targeted advertising that most small companies do, your client's planned, repeatable schedule of targeted and compelling offers makes it a system.

There's some work to be done here in planning these targeted compelling offers—and that is what the Implementation Guide is for.

[continued on next page]

STEPPING A CLIENT THROUGH THEIR HOMEWORK ASSIGNMENT

Let's turn our attention to the Implementation Guide that I emailed you, a file called, ADVISORS-1-ProspectingPlan.pdf.† This is a document that the client team will see.

And because we've gotten so many questions about these guides, we've made the decision here at Profit Advisors corporate to allow consultants to reproduce these guides for their client meetings. This will alleviate delays in shipping, allow you to manage your costs better and just make things easier for you as a consultant. They cannot be reproduced or distributed for other uses or for sale separately, but they can be reproduced, at will, for your use in client meetings.

So if you turn or scroll to page 2, you'll see instructions for the exercise you'll be facilitating onsite with the client team. Be aware that you'll go through this exercise for just their top 3 products and services. Then, their homework assignment is to complete this process for other products and services they want to advertise for prospecting and lead-generation purposes.

These worksheets on page 3-5 are pretty explanatory. Notice you'll be starting with the product or service to be advertised, then determining the target market… which offer to use for that product, determine the company's Unique Selling Proposition to put somewhere into the ad or marketing campaign. And you'll discuss which is the best marketing device to be used—such as a newspaper ad, direct mail piece and so forth—and how it will be distributed… through a specific newspaper or magazine, to rented list of names, through a joint-venture party and so on. Be sure to finish with a discussion of how the responses to these ads will be tracked or handled when they come into the company by any method.

And again, you'll notice this entire module is dedicated to prospecting and lead generating OFFLINE. Using the Internet to find new customers is contained in another module.

This exercise is really where your guidance will be valuable to the client. If they don't have a history of what has worked for them in the past, they may not know where to run ads or how to rent mailing lists or which radio stations are appropriate. You can provide guidance on how to research these—but you don't have to have complete working knowledge of every publication in their industry or the specifics of every radio station in town.

Our entire team is also ready to help you whenever you need suggestions in this area. We are available via email at any time and available by phone during the coach-on-call sessions—currently Thursdays from 9am to 11am Pacific Time.

So after facilitating the exercise for the top 3 products and services, turn to page 6 of the Implementation Guide and you'll see there are instructions for the client team as to what to work on over the coming month. All Implementation Guides have these instructions to the team to cut down on urgent consulting calls to your office. In this case, the team is instructed to complete the campaign planner starting on page 7 for each of the top 3 products you just discussed and to complete the chart on page 7 by creating a list of ALL products and services, bundled packages and other items that could be advertised to generate prospects. Then the team

† To view this file, please see "TRAINING YOUR PEERS: Sample Client Homework Assignment" in the Replicate Peer-Certification module where you found the document you're reading now.

should complete the chart with the target market for each of those products or bundles, a possible offer for that product or bundle—the marketing device to be used and the how that marketing device (whether an ad or letter or radio commercial etc.) will be delivered.

SUMMARY

Pretty simple, this system is really just all in the planning.

So that is how a client meeting should go—very structured. A little but of tutorial, you facilitating an exercise, finished by you giving instructions on the homework assignment. And ALL of the client meetings are structured this way, except for Module #12 which is a final meeting with the business owner alone to recap the year and upgrade them to a longer client relationship.

END LECTURE AND OPEN THE TRAINING CALL FOR QUESTIONS FROM PRACTITIONERS

I'm going to open things for questions from our consultants.

ABOUT THE REPLICATE PEER-CERTIFICATION PROGRAM:

Founded by industry veterans Paul Martinelli and Janet Switzer, the *Replicate Peer-Certification Program* helps business owners, professional practitioners, and subject-matter experts create a network of their own consultants, peers, coaches, trainers, or fellow entrepreneurs who are proficient in the experts' proprietary methods and who can bring this important knowledge to millions of consumers and entrepreneurs worldwide.

Learn more at: www.replicateprogram.com
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