

Strategy Session Selling Formula



Part 1: About Strategy Sessions

Imagine being able to easily sell more of your high-ticket offers.

Imagine looking at your calendar, seeing that you have several calls scheduled with potential clients over the next few days, and knowing that you will be able to sell your offer to a high percentage of them.

Think about your profit margin per sale and imagine several times that amount being deposited into your account in the next week or two as you book these new clients.

This is not a fantasy. It's what this report is all about. We're going to show you a method that is easy to learn and implement that will have you bringing in more high-ticket clients, as well as clients who are more aligned with your style and what you have to offer. It's the best way we've found to make these sales.

Strategy Sessions Defined

This report is all about strategy sessions. Let's define what that is so we're on the same page. A strategy session is a free, private, one-on-one call with a potential client (or in some cases, customer, student, patient, etc.).

Some people use other names for strategy sessions, such as *consultation calls*. Use whatever wording makes sense for your business, and we will stick with strategy session for this report.

A strategy session is scheduled in advance and is short in duration, typically 20 to 30 minutes.

The Goal of This Report

The primary purpose of this report is to teach you how to use strategy sessions to sell your high-ticket services and products, such as:

- coaching
- consulting
- therapy and counseling
- done-for-you services
- courses
- masterminds
- seminars, workshops, bootcamps, retreats, etc.

In short, nearly any high-ticket offer can be sold via the strategy session model. Most of the examples above fall into the information marketing industry.

Think about a totally different field, like law. Many attorneys will meet with a potential client for free to discuss whether the person has a case worth pursuing. That is the strategy session model, just usually done in person rather than via a call.

We will often use coaching as an example in this report, so just keep in mind that strategy sessions have much broader uses.

The Power of Strategy Sessions

Many business owners have found the strategy session model to be the best way to sell their high-ticket offers. There are many reasons for this.

It's difficult to sell offers over \$1000 or so directly from a sales letter or sales video, no matter how compelling the message is.

It's also difficult to sell one-on-one services like coaching or consulting without first speaking to the potential client, especially if your name is not well-known in your industry. This is actually a good thing for you, since it helps you screen out people who aren't suitable for your program before you start working with them.

Obviously there are exceptions. Someone with a strong, established brand like Tony Robbins can sell their high-ticket offers directly from advertising. However even companies like that often use some method of selling over the phone.

The Goal of a Strategy Session

A strategy session is not a sales call, although it often results in a sale. The primary purpose of the call is to see whether the potential client is a good fit for what you're offering, and vice versa.

It's especially important to understand the difference between a strategy session and traditional telemarketing-type sales calls, which often use high-pressure sales tactics, are typically done by salespeople who work on commission, and whose main concern is making the sale, regardless of whether the offer is appropriate for a specific client.

Unfortunately, some companies doing that type of selling use the term strategy session, which can give people a bad impression of the term.

(We don't mean to put down traditional phone sales methods, just want to stress that this report is about something completely different.)

We believe that you should have a second purpose for your strategy sessions, to help your prospects as much as possible in the amount of time you spend with them.

Many people are skeptical these days. When they schedule a strategy session with you, some will expect it to be the typical high-pressure sales call. When they realize you're actually having a conversation with them and trying to help them, they will be pleasantly surprised.

As great as it might sound to sell everyone you talk to, that shouldn't be your goal. The odds are high that some of the people on your calls should not become your clients, for various reasons. Some people have unrealistic expectations. Some won't take action on what you teach them. Some will have personality conflicts with you. Some would rather argue than follow your advice. And some are simply looking for something other than what you offer.

It might sound like a paradox, but quite often, the best way to make a sale is to **not** hard sell the prospect. When you speak with ideal prospects, often they will want to buy from you before you bring up the subject.

In some cases, the prospect won't buy your offer for whatever reason, but will be so impressed with the help you gave them that they will refer other clients to you or give you a testimonial.

If you consider yourself to **not** be a natural salesperson, I have great news. The strategy session model is especially suited for you, because it doesn't require you to be the stereotypical pushy salesperson. In fact, people who aren't naturally good at sales often excel at the strategy session model, because it's more about having a conversation and helping people than hard selling them.

This is a skill you can develop. It's not something you have to be born with to get good at doing it.

Regardless of your personality, the more strategy sessions you do, the better you will get at doing them, and the more sales you will make. You will get better at attracting the right prospects to your calls. Both of these factors will lead to a higher percentage of strategy sessions that result in sales.

Other Uses for Strategy Sessions

There are some other good uses for strategy sessions besides screening prospects and making sales.

They can be great for researching your market before you release your high-ticket offer. Once I was creating a high-ticket course and wanted to make sure I covered everything I should, so when I was about halfway through creating the course, I set aside a day to do 12 strategy sessions.

I told people when they signed up that we could discuss anything they wanted on that particular subject. I spoke with a nice cross section of people and was able to answer almost all their questions. I got several good ideas for things to add to the course that I hadn't thought of. On the calls I didn't mention that I was creating a course and didn't try to sell anything. (Looking back, I probably should have mentioned the course and offered to send them a discount offer on it when it was ready.)

Another great use for strategy sessions is to get a taste of what it's like to do coaching or consulting when you haven't done that work before and might be unsure if it's for you. If you don't enjoy doing a strategy session, you're probably not going to like coaching or consulting very much and should consider creating some other type of offer.

Part 2: The Step-by-Step System

Here are the steps in the process. We will discuss each of them in order after this list:

1. Establish your credibility
2. Schedule the strategy session
3. Form a connection
4. Take the lead
5. Show your value and focus on the results
6. Overcome objections
7. Start the relationship right

Steps 1-2 happen before the call, 3-7 on the call, and step 8 after the call.

Before the Strategy Session

Establishing Your Credibility

Before offering strategy sessions, you should start getting yourself known as an expert in your field. This gives you credibility with prospects. If you skip this step, you'll have trouble getting people to sign up for strategy sessions, even though the calls are free. Some will schedule a call but not see you as someone who is worth what you charge for your services. Or they will second guess what you tell them, which makes it difficult if your job is to coach or advise them.

The first half of this is simply getting your name associated with your niche, for example "Sally Smith is a marriage counselor."

The second half is demonstrating that you know what you're talking about. ("Sally Smith is an

expert in the field of marriage counseling.”)

There are many proven ways of establishing your credibility. Here are some of them:

- Create a blog
- Write a book (printed or ebook or both): For centuries authors have written books to establish themselves as experts, often more than to earn royalties from their books.
- Publish your book for Kindle: Tap into Amazon's huge customer base
- Create an author page on amazon.com and add your blog and Twitter feeds to it
- Guest post on other people's blogs, especially high-traffic sites like the Huffington Post and well-known blogs in your niche
- Make thoughtful comments on other people's blogs, especially those which allow you to include a link to your website/blog
- Start an email list and send out quality content to your subscribers
- Write a free report (like this one) and give it away to get subscribers. Let others in your niche give it away to spread your message
- Write for magazines or trade publications in your niche
- Write reviews for relevant books or other products on amazon.com and use your real name (that you do business with) as the review author

Notice those all have something in common, writing. I realize not everyone likes to write. These tasks can be outsourced. Just make sure the final product that the public sees is high-quality. (If you'd like some help setting this up, [click here](#).)

We all know how big social media has become. Here are some things you can do to promote yourself there. The best social media sites for you will depend on your niche. Don't feel like you have to have a presence on every social media site, or it could become a full-time job.

For example, sites like Pinterest and Instagram are image-oriented, so if your niche is something visual like art or photography, it might be a good idea to have a presence there. But if you do business consulting or sell insurance, probably not.

- Create a Facebook page for your business and post on it regularly
- Create a LinkedIn page for your business and post on it regularly
- Create a YouTube channel for your business. Make short, relevant videos and post them there. Also post them on your blog and other social media sites
- Join Facebook and LinkedIn groups in your niche and make helpful posts
- Join forums in your niche and make useful posts. Include a link to your site if allowed

Here are some other ways to promote yourself beyond writing and social media:

- Be a guest on podcasts in your niche. Talking about your field of expertise will make you better at doing strategy sessions
- Do as many media appearances (radio, TV, newspapers, etc) as you can
- Attend events in your field. Volunteer to speak and appear on expert panels
- Do interviews in whatever format and media you can, as the interviewer and interviewee
- Get to know other experts in your niche. You can interview each other, refer business

to each other, etc.

Scheduling Strategy Sessions

Scheduling is important, no matter how much free time you have, because you should start the relationship by stressing that your time (and the other person's) is important and people can't just call you whenever they feel like it to do a strategy session.

So how do you get people to sign up for strategy sessions? First, realize that you can only fit so many of these calls into your schedule, so you should be selective about who gets one. The best way to do this is to make people fill out an application, an online form with some questions they have to answer before they can get on a call with you.

Having an application accomplishes several things. It helps you gather some information before the call about what the prospect is looking for. In some cases this will be enough for you to realize you can't help them, so you can politely cancel the call and save yourself both the time. It shows the prospect you're serious by asking for the information upfront. It helps you prepare for the call by having some idea of what questions or problems the person has. It also weeds out people who aren't serious enough to spend a few minutes filling out the application.

Make it clear to your prospect that you have set aside a specific time period for them (such as 2:00 – 2:30 pm), so if they show up late, they will lose that amount of time. For example, if someone doesn't show up until 2:15, they will get 15 minutes maximum. Be firm on this and don't let people go past the scheduled end of the session, or some people will abuse your time. Stick to the scheduled time slot, even if you have nothing scheduled after it.

Questions to Ask on Your Application

Ultimately it's up to you decide what to ask on your application, based on your business, and this may evolve over time. Here are some suggestions to get you started:

- Basic contact information: name, email address, phone number, Skype name (especially if you are in different countries and don't want to use the phone)
- Tell me about yourself, product or Idea.
- What would be the MOST important criteria for your success as we work together?
- What do you think is holding you back (from reaching your goals, solving your problems, etc.)?

If you're selling business-related services, add questions like these:

- What's Your Website URL (if you have one)?
- How many people are currently on your email list?
- Current Monthly Revenue
- Monthly Ad Budget

- How willing and able are you to invest in growing your business right now?
- At this time, what investment can you make in growing your business?

Technical Aspects of Scheduling Strategy Sessions

Setting up this process online used to require you to use two pieces of software. You needed one to create the application form and another to let people see your available times and schedule your call. There are a number of software products that can create online forms and a bunch of others for scheduling.

We've tried cobbling together various combinations of these products, looking for the best solution. We quickly found that if we have people book a time first, many of them don't bother to fill out the application, either because they're confused or think it's OK to skip that step.

If we have them fill out the application first, many of them who do so don't book a time, for whatever reason.

We found ourselves having to do a lot of manual followup to get everyone signed up properly, and the whole point of this was to have an automated system that prospects could easily use to apply for and schedule a call.

A Software Solution

Unfortunately, there wasn't one software package that did both parts of this process, so we decided to create our own. We now make it available to our clients. It's called TimeSlots, and if you'd like to know more about it, you can [watch this video](#).

How to Dramatically Increase Your Attendance Rate

Some people will book strategy sessions, then not show up for the call. Here are some things we do to cut down on that.

Once someone schedules a session, follow up with them. Send them a personal email within 24 hours of them scheduling an appointment that takes some interest in them or their business.

For instance, "Thanks for scheduling a call. I checked out your website and I saw that you've got a ton of products - great job!"

Or if your offer isn't business-related, something like, "It sounds like you've made some good progress already. I look forward to helping you reach your fitness goals faster."

Then, always close the email with a question.

For business offers: "Do you have any sales material or webinars that I can go through before our call - so I can familiarize myself with your process?"

For non-business offers: "Which diet plans have you tried so far, and which one gave you the best results?"

In other words, personalize the email so the person can see you're taking an interest in them and their needs, and ask questions that will give you more information you can use to help them on the strategy session.

This dramatically improves the show-up rate.

The other thing to do to increase attendance is to call the prospect at the scheduled time, rather than having them call you. Some people just forget or aren't watching the clock, so if you wait for them to call, more of them will miss their appointment.

During the Strategy Session

Form a Connection

When you start the strategy session, put the prospect at ease. Remember that they might be expecting a hard sell call, so when you start asking about their situation and listening to them, that will go a long way towards establishing rapport and building trust.

Show the prospect that you care about them and their problems more than you care about making a sale.

Take the Lead

Once you've formed that connection with your prospect, you must take control of the session. Otherwise there's a danger that it will just start rambling all over the place, your prospect won't get much out of it, they will leave confused or dissatisfied, and you won't make a sale.

Remember, this is a strategy session for a specific purpose, not a couple of friends chatting on the phone. If the client starts to wander off, get them back on track. (If they won't let you do that, that's a sign that they might not be a good client for you.)

You don't have to write a script for your session, but it's good to have an outline of what you want to cover on the call. You can make a standard outline, then modify it a bit for each prospect based on their application. Make sure to answer any questions and address any concerns they listed on their application. Do that before you answer new questions.

Strategy sessions are short by design. The goal is not to answer every question your prospect can dream up, but to help them as much as you can within the allotted time. If they have more questions than you have time to answer, that's a sign that they should be buying your services to work with you further.

Don't let the prospect interview you. Even though buying your service is a form of hiring you, this is not a job interview. Don't let them take control of the call.

Also, don't feel like you have to give the prospect every secret or strategy you know on the call. Give value, but save something for your paying clients.

Keep an eye on the clock during the session. If you sense that the prospect is a good fit for your offer, allow yourself enough time at the end of the call to present the offer, maybe 5-10 minutes. (You'll get a better feel for how much time after doing a few sessions.) Don't get so focused on helping that you run out of time to make the offer properly.

Show Your Value and Focus on the Results

This step builds on the last one. Part of taking control of the session is taking the prospect through a process that shows them the value they will get from your program.

If you can't lead them on the call, how can you coach or consult them in the future?

Remember, you need to establish not just that the prospect can benefit from your service, but that they should get it from you rather than someone else.

This involves painting a picture for them of the results they will get from working with you.

Failing to show your value is one of the top reasons why people won't buy your offer. They might believe that coaching (or whatever the service) is a good idea for them, but not that you're the right person to coach them. This is much like going to a job interview and not being able to show the employer that you are the best person for the job.

Realize that what you're really selling is not your service or product, but the results people will get from it. For example, don't sell them a weight-loss program, sell them the benefits of a trimmer body, better health, higher self-esteem, etc. That's really what people want when they buy something in that niche.

If you have successful clients, you can mention some of their results (while respecting their privacy) as one way of establishing your value.

This is also a good place to mention any testimonials you have from previous clients.

Your goal here is to create excitement. Help the prospect create a vision of their future from the results they will get from working with you. Get them to believe in themselves and that

they can achieve their goals.

Overcome Objections

Anytime you are selling something or trying to persuade someone to do something, you can expect objections. These are reasons or excuses for not buying.

Make a list of as many objections as you can think of and come up with replies for each one.

Here are some common ones:

- I can't afford it
- I need to think about it
- I have to talk to my spouse/partner first
- I don't have time

“I can't afford it”

Sometimes this is true, but it's also commonly used by people who don't want to buy.

If you're delivering a service over time, such as a three-month coaching program, one way to address this objection is to offer a payment plan. Instead of paying the full amount upfront, let the client make three monthly payments.

I would not offer a payment plan that lasts longer than it takes to deliver the service. If you offer a six-month payment plan on a three-month program, the client's incentive to keep making payments once the program ends drops dramatically. If they stop paying part way through the program, you have the option of putting future work with them on hold until they catch up with the payments.

PayPal has a program that lets you offer six-month, no-interest financing to your client. The great thing is that you get paid the full amount right away, and the client makes the payments directly to PayPal, so you don't have to deal with it. Check with PayPal for current details, but at this writing the client has to be a US resident and the offer price must be at least \$99.

Another price-related objection that you'll probably hear if you're selling anything related to business or making money goes like this: “Give me your service/product for free, then once I make enough money from it, I will pay you for it.”

Some people will even phrase that to make it sound like if you say no, your service or product must not be very good and you don't have much confidence in it.

I would never accept that arrangement. It assumes that you and your offer are 100% responsible for the client's success. That's not a premise I would accept. The person who gets

in free has less incentive to do their part. Then if they fail because they don't take action, you probably won't get paid, but probably will get blamed.

“I need to think about it”

“I need to think about it” is often true. People have different buying styles based on their personalities, and some of us need more time to make major purchase decisions. Have you ever noticed how some people will do lots of research before buying a \$100 item, while others can spend \$5000 at the drop of a hat? That's often due to their buying styles, not necessarily how much money they have. Some people need to wait a certain amount of time or look at X number of options before making a decision.

I can identify with this one because this is how I am. If I'm on the client side of a high-ticket strategy session, even if I'm 95% sure I want to buy, I almost always say let me think about it for a day or two. Pressuring me to say yes or no on the spot is going to get you a no for not respecting my need to give the decision some more thought.

The way I would handle this situation is to ask how much time they need to make a decision, then schedule a followup call with them that far in the future. For example, “You need a couple of days, so if I call you at 4 pm Thursday, you'll have a final decision for me?”

I would make that followup call short and sweet. If they say they still haven't decided, that usually means the answer is no, but they don't want to say that directly, so they will keep stalling and hope you eventually get the hint. I would say “OK, you know how to get in touch with me if you decide to take me up on this offer.” At that point I wouldn't chase them, since I've already spoken with them twice, and they still haven't decided.

“I need to check with my spouse/partner”

The need to get spousal approval is often a valid objection. I know many people who would get in serious trouble if they spent several thousand dollars on their own without involving their spouse in the decision, so I can't blame them for wanting to check first.

Spousal approval is also commonly used by people who don't want to buy, but have trouble saying no. It's easier for some people to bring up the spouse than reject your offer when talking to you. Some people will even use this as a bargaining tactic, as in “I'm ready to say yes, but my wife might get upset if I spend this much. Can you cut the price so I can get her approval?”

I would handle this one the same way as the person who needs more time. Ask how long they need to check with the spouse and make a decision, then schedule a followup call. It can be hard to tell when this objection is real, since it's such a common situation, so I usually take the person at their word and follow up with them in a few days for an answer.

“I don't have time”

This one doesn't make much sense to me. We assume the person has problems to solve or goals to reach, which is why they booked the strategy session in the first place. Yet they don't have time to work on those things? You can point out that the problems won't solve themselves or goals won't get achieved without taking action, all of which takes time.

The true meaning of this excuse and many other objections is usually one of these things:

- The prospect knows they don't want to buy, but has trouble saying so directly
- You haven't done a good job of establishing your value or explaining your offer. (They know they need help but aren't sure if you're the right person to help them.)
- The prospect is indecisive in general and has trouble making decisions (usually not someone I would want to work with)

The only one of those that you can solve is the second one. You can always get better at establishing your value, explaining your offer and why it's a good fit for the client. You can also get better at screening the prospects via your application.

Keep track of how many people you do strategy sessions with, how many say yes or no to your offer, what objections they have, etc. Over time, you should see your conversion rate go up- that's the percentage of people who book a session and end up buying.

After the Strategy Session

Start the Relationship Right

The final step is to get off to a good start when you have a new, paying client. Many people have buyer's remorse soon after making a major purchase, so part of your job is to reassure them that they made the right decision.

Help your new client achieve some successful result, no matter how small, as quickly as possible. This will build their confidence in themselves and in you.

What's Next

[Watch this video about TimeSlots](#) to discover how easy it can be to fill your calendar with strategy sessions and qualified prospects.

Strategy sessions are one of the best ways to make high-ticket sales and find the most suitable clients for your business. If you're uncomfortable with selling, don't feel bad. Look at a strategy session as an opportunity to speak with a new person and help them with their problems, rather than a sales call.

The more of these sessions you do, the better you'll get at them. You'll get better at delivering value on the calls, better at signing up the best-qualified prospects for your offers, and ultimately, better at delivering your high-ticket services.

One last thought: if you currently only offer high-ticket services and products, consider creating some low-priced products like courses or ebooks. Adding some of these products to your funnel is a great way to get your name out to the marketplace, show your expertise, and eventually make some high-ticket sales to people who start at the low end of your funnel.

People who have already bought something from you in your niche, no matter how low-priced, are more likely to buy from you again. It's not unusual for someone who buys a \$27 ebook or \$99 video course to take the plunge into a \$2000 workshop or \$5000 coaching program, so don't write off the low-end of the market.

If you need help designing or building your marketing funnel, or would just like someone else to do that for you, get in touch by [scheduling a session with us here](#) – or [watch a workshop presentation here](#).