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YOUR ROADMAP TO A SMOOTH DISCOVERY CALL

PLAN IT IN A WEEKEND!

INTRODUCTION

Don't dismiss the power of a personal conversation. Sending out links to sales pages amid well-thought out campaigns can certainly work wonders for sales but it's that personal conversation that allows you, the coach, to really get to know a prospect. In turn, that same prospect can learn more about your personality and values simply by listening to your delivery and how well you will fill her needs.

This is the power of the discovery call.

Discovery calls are important for onboarding a new coaching client or for interviewing potential members of a mastermind group or other paid program you have developed. Programs which command a higher price tag are meant for prospects who have earned a certain level of income or years of experience in their own business. Placing a newbie who just started their business with other more advanced and experienced owners is asking for trouble and disconnect, no matter how motivated that newbie may be. How do you discover these things? Through discovery calls.

If you've never held a discovery call, no worries. You'll have a plan for handling these calls before the weekend is over. If you've already had your share of discovery calls, you'll still find new ways of handling these calls so you can qualify your prospects with more accuracy and sway their purchasing decisions more frequently.

I'll take you through the process of choosing a lead magnet, how to pre-screen prospects, how to take control of these discovery calls, and how to automate the process so you have more time for work. Take some time to really work the exercises and you'll be in good shape to proceed with putting this process into place.

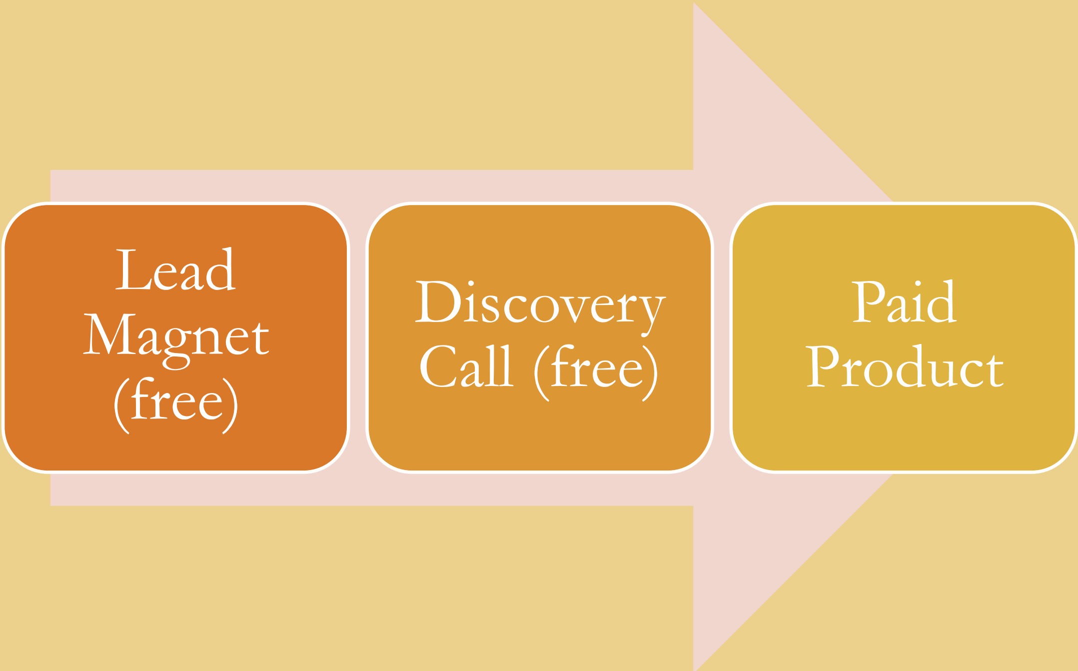
Let's get started!

STEP ONE: BUILD AN ENTICING FREEBIE TO DRIVE CLIENT SIGN-UPS

Lead magnets are an important part of your marketing process and should not be ignored. As the name implies, these free offers attract leads to your website and to your sales funnel. Once inside your sales funnel, you can build a nurturing relationship with these leads by showing your expertise and making paid offers they will find irresistible.

These freebies are meant to showcase your skills and knowledge; they are NOT meant to serve as a free coaching session or how-to course. The idea is to show your leads what they need with the freebie offer and then teach them how to reach their goals with your paid products.

Visualize the relationship between your lead magnet, discovery call, and paid product as such:



Your lead magnet attracts the prospects. The discovery call qualifies candidates. The paid product teaches your customers how to do something or supplies a resolution to their problem.

Now, not every paid product needs a discovery call. If your product is a stand-alone home-study course that doesn't include any coaching time with you, then you can skip the discovery call and just direct the lead magnet to the paid product's sales page.

For ANY products that include YOUR time, a discovery call is necessary. Mastermind groups and exclusive VIP "inner circle" groups are examples of when you need to approve your prospects because these groups only work when all the attendees are participating freely. They have made a commitment to the meeting times and a promise to do the coaching tasks assigned. The momentum of these groups only works when everyone is involved. If there's a candidate who isn't attending or voicing their input, the group as a whole suffers.

Different Lead Magnet Formats

A webinar is often the most successful tool because you can show your personality and coaching style live and in front of hundreds of viewers. Your audience will immediately know if they like your style or if they believe you're the expert they need in their lives.

However, webinars are not the only type of lead magnet you can produce. Downloadable products such as short reports, checklists, writing prompts, or a chapter from your eBook also work well in attracting prospects. If a live webinar isn't your thing, try a pre-recorded video series instead or an eCourse. You know your ideal audience best so choose a format that will attract them but is also easy for you to produce.

Choosing a Topic

Since your lead magnet and discovery call all work as a roadmap leading to the paid product, these topics should be related to each other, too.

For instance, if your paid product is all about email marketing strategies, then your lead magnet should be related to email marketing, too, such as a freebie with copywriting suggestions for crafting email subject lines that increase open rates. Email marketing doesn't work without people opening the messages, so the copywriting freebie is a great tie-in.

Likewise, the discovery call for this same example should stay focused on the particular subject at hand: Email Marketing Strategies. You are in charge of the call and want to ask qualifying questions all about the prospect's email marketing practices to be sure these prospects will really benefit from purchasing your course. Sometimes all it takes is a friendly conversation with you to move them closer to buying mode. More about planning the discovery call in Step Two.

No matter what your topic, make sure the freebie is valuable and topical but also includes a plug toward the end asking people to sign up for a free call to learn more. If your freebie is filled with fluff, your prospects won't even finish reading or watching it and certainly won't waste time on a call. Produce your freebie with as much effort as you used producing your paid product.

In addition to your usual marketing plans, consider running Facebook ads to reinforce the message from the freebie: Sign up for a free call to learn more about X topic. These ads also work well to drive people to your lead magnet so you can always test it out both ways and track which brought you more leads: Linking directly to the lead magnet or directly to the discovery call. You might be surprised by the answer!

Exercise: Brainstorm ideas for your lead magnet which are tied-in to your paid product.

Topic Ideas	Format Ideas
Is the topic related to your paid product?	

Exercise: Which formats are easiest for you to produce?

Formats I Know How to Produce	Products I Need to Have to Produce
	Software, graphics, equipment, etc.
Outsourcing Options	**Outsourcing Budget**

Marketing/Advertising Plan	Marketing/Advertising Budget

STEP TWO: PRE-SCREEN TO ENSURE ALL YOUR PROSPECTS ARE PERFECT FITS

If you're panicked at the idea of having to schedule 100 discovery calls, don't worry. You still have some qualifying to do.

Obviously, your time is precious, so don't take discovery calls with just anyone! You need to be sure your prospects meet certain qualifications and are ready to do the work. If your paid product is a mastermind group or other group coaching, you want to be sure these prospects are committing to the time frame and won't make excuses for missing calls.

The easiest way to pre-screen prospects is to create a questionnaire on your website (your VA can do that for you). Formidable Forms is a reliable and powerful form-building plugin for WordPress sites which allows you to construct a questionnaire asking for all the information you need to determine if this person is a good person for a discovery call.

Some sample qualifying questions include:

- How much are you willing to pay for X, Y, Z services?
- How much time can you devote to assigned tasks?
- Have you worked with a coach before?
- What are your current career goals?
- Ask questions to make sure they would work well with you.

It's also worth reminding you to put in fields for the prospect's name and contact information. It's an easy thing to overlook when you're so focused on writing the best qualifying questions! Also consider adding a few words stating that by filling out this questionnaire, they are granting permission for you to contact them via email regarding this offer.

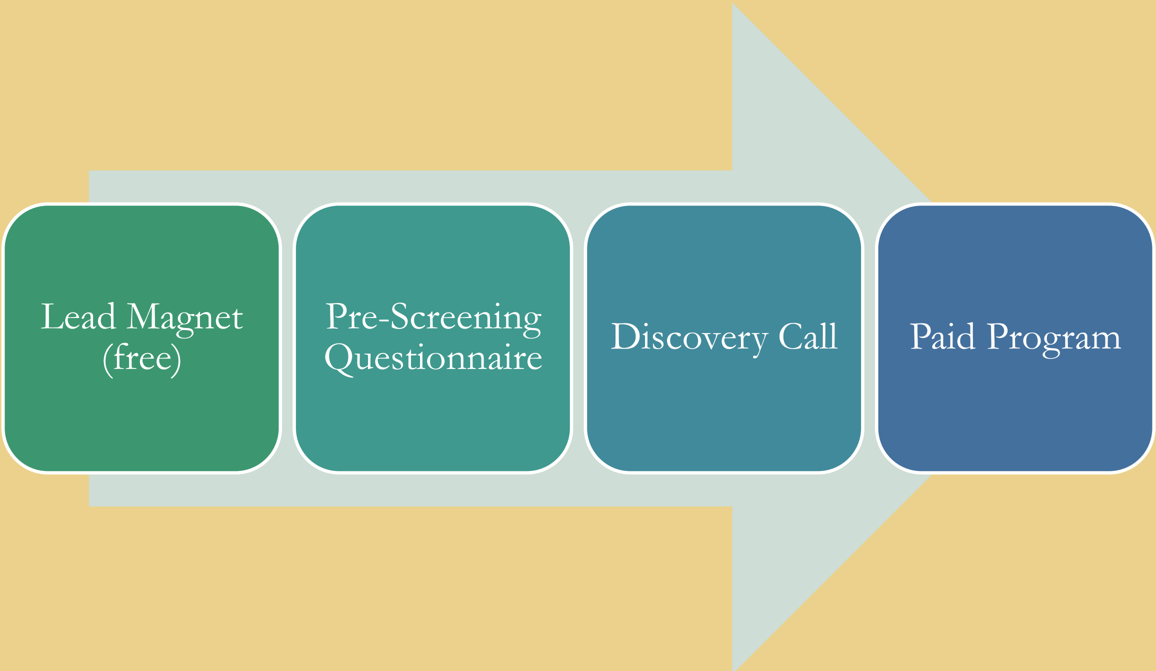
Something else to include on this questionnaire is a notice that you will ONLY contact those candidates who you feel would be a good fit for the program. Describe your ideal customer and their values and work ethic; then describe the details of this program and the expectations you hold for each participant. Now let your readers decide if they want to fill out the questionnaire.

For any number of reasons, people will get to the survey and not complete it. They may not want to take the time; they may hate being on the phone; they might save it for later and then forget about it; they might read your expectations and realize this isn't the program they want.

But don't worry…this is a good thing! By not filling out the questionnaire, people are pre-qualifying themselves. Whoever doesn't fill it out is not a good fit because they couldn't finish this one task. Any other coaching tasks would likely be overwhelming and they would end up requesting a refund and dropping from the program.

For these types of programs, it's OK to be exclusive and make this decision yourself instead of just collecting people's hard earned money. It shows your integrity for the program but also shows that you care more about the experience people have inside the program than you do about earning the almighty dollar. For those who do not fill out that survey, they will likely still remain a loyal follower who will purchase lower-priced products that don't require a commitment.

In summary, your lead magnet will include some information about your discovery call and teasers about your paid program. This link directs to your questionnaire page on your website, NOT your general home page – that's a quick way to lose prospects!



Also keep in mind that this is a process that doesn't necessarily have a quick timeline. You need time to market your lead magnet. You need time for people to fill out the pre-screening. You need time for discovery calls. All this seems to drag on but if it brings you the number of ideal clients you need to fill your program, then isn't it worth it?

Of course, if you're looking to close your program on a certain date, explain that in all your efforts, from the lead magnet itself through to any advertising you run. Expediency is another way to qualify your leads because only the most interested will move quickly.

Exercise: Determine your ideal client and create your pre-screening form.

<table>
<tr><th colspan="2">Describe Your Ideal Client</th></tr>
<tr><td colspan="2">Use this as your criteria for who gets a discovery call and who does not.</td></tr>
<tr><th>Research/Choose a Form Builder</th><th>Write Your Pre-Screening Questions</th></tr>
<tr><td>○ Formidable Forms
○ Other:</td><td></td></tr>
<tr><th colspan="2">Create Your Pre-Screening Page</th></tr>
<tr><td colspan="2">○ Create page
○ Install form builder
○ Include description of your "good fit" ideal client
○ Add questions
○ Set up email link so you get responses to your inbox
○ Read responses and decide on who gets a call
○ Or delegate all this to your VA</td></tr>
</table>

Set Up Your Discovery Calls
○ Only contact those who qualify ○ Send email with link to appointment calendar ○ Set up autoresponder reminders to avoid being stood up

STEP 3: CREATE A CALL RUBRIC THAT PUTS YOU IN THE DRIVER'S SEAT

A discovery call needs to be guided and structured, not a "pick your brain" session with 15 minutes of small talk before you dive into the topic at hand. You have a LOT to go over and this is work time, so treat it as such and be prepared.

A rubric is nothing more than a chart or list of notes and/or questions that you want to review with each prospect. Similar, in fact, to the ones middle school teachers use to indicate all the individual features they expect in a project along with a chart to denote whether it was included and how many points to assign.

Discovery calls are filled with information and it can get difficult to keep all the answers sorted correctly if you don't use a rubric of some sort. And if you schedule multiple calls in one day, chances are high that you'll confuse the candidates' answers, so it's best to keep the information sorted from the start.

Here are a few tips to keep your discovery calls on topic and moving forward:

- Anticipate needs/questions
- Address roadblocks head on
- If you get tons of questions about a certain aspect of your topic, answer them before the caller can even ask; this saves time and positions you as a subject matter expert.
- Offer value, input, and guidance over the course of the call ... but leave room for your pitch. It's OK to omit certain info/tips and point out that they're part of your PAID offering
- Include questions for the caller (what are their challenges around X, what would they most like to know about Y) and evergreen tips (everyone I've worked with has benefitted from changing/doing Z)
- Round out the call with, "We've done a lot today, but you need to dig deeper. My paid course/offering will get you there."
- Create a time-sensitive, call-specific discount.

If you're receiving multiple objections to any part of the questionnaire, such as money, write down your answers to those objections so you're not fumbling during the call. It's another form of anticipation. If you have callers asking multiple questions or bringing up multiple objections, it could be interpreted as they're very interested in your paid program and they are also doing their due diligence, just like you are. That's a very good sign!

Step-by-Step to a Perfect Discovery Call

Not everyone will have the same type of call; some will be easier than others but they should each have the same structure so you know you're not missing any important facets.

1. **Preparation.** Know the prospect's name, look at their questionnaire, and check out their social profiles.
2. **Strong but short opening speech.** Put the prospect's mind at ease and reassure them they WILL get all their questions answered.
3. **Ask about their goals for the call.** "What would you like to get out of this meeting today?"
4. **Never assume.** Ask questions to determine what problem your prospect is looking to solve.
5. **Reassurance and wrap up.** Start to highlight the features of your program that will solve your prospect's problem. Address all of their concerns they mentioned and go into more detail about your offer plus the deadline.

Don't think of this as a sales pitch or that's how it will come across. Take the time to LISTEN to your prospects, have a conversation, address their concerns, learn about their business, and make the determination about whether they are a good fit for your program or not.

During the course of the conversation, if they aren't giving you the answers you expect from an ideal client, or if they seem unsure of themselves, it's perfectly acceptable to cut the conversation short and explain that you don't think they are the right fit for your program. Reassure them that doesn't mean forever but that they need to do some more work (or reach some more milestones) before being considered again.

Do You Need a Script for a Discovery Call?

The short answer is no; or at least not a verbatim script like you would use for a webinar. A discovery call should be more intimate and personal and focused on in-the-moment reactions. If you're scanning a script to figure out what you're supposed to say next, you may miss a chance to interject and have a regular conversation. This distraction could be off-putting to your prospect because it could appear that you're not paying attention to what she's saying.

On the other hand, using the rubric as an outline of how the conversation will progress allows you to pay closer attention to the answers your prospect is giving you, which will make them feel special.

Practice Your Delivery with a Friend

Even natural-born speakers who can gab for hours on end may run into some questions they weren't prepared for. Instead of sounding awkward on the call, ask a business friend to run through a mock discovery call with you. They can give you feedback on your delivery (whether you sounded nervous or natural) and they can give you feedback on your time-sensitive offer. Your business friend – who may or may not be part of your ideal audience – may even come up with some questions you didn't expect. Or they may give feedback that your answers to the objections aren't clear or wouldn't appease the prospect.

Exercise: Create a rubric for your discovery call. Write down answers to common questions or objections.

Common Questions or Objections	Your Responses

Exercise: Print out this rubric for each discovery call to keep your prospects' answers organized and to evaluate if they are a "good fit" candidate for your program.

Prospect Name: ______________________Date: ____________Program: _________________

Questions to Ask	Your Responses to FAQ	Prospect's Answers

Exercise: Write out your rejection speech for those who are not a good fit for your program.

How Will You Tell People They're Not the Right Fit?
○ Be kind but straightforward. ○ Is there another product of yours you can recommend? ○ Give a tip of what they should work on before applying again.

STEP FOUR: WRITE AN UNFORGETTABLE FOLLOW-UP EMAIL SERIES

You've got people submitting the questionnaires. You see quite a few qualified leads coming through so you're encouraged that your program will fill up quickly. You're having some awesome discovery calls with excited prospects who are excited about your offer.

I bet you're forgetting one very important thing: The follow up. Are you hanging up the phone and waiting for the prospect to take this leap and purchase your program? Why are you waiting and hoping? Maybe they need more guidance or one last reminder that a deadline is swiftly approaching.

Or maybe life just got in the way and work got crazy and they forgot about the paid offer. If you don't remind them, the lead will go cold, which means you'll be starting over again at square one to earn their trust.

You need an email follow up series!

By filling out the questionnaire for the discovery call, your prospect filled out their email, thereby giving you permission to contact them via that address. So set up an email series that will automatically deliver a short series of emails to serve as reminders.

Here's a sample series which you can modify to your liking:

Email 1: Thanks for taking the time to talk today. Remind them about the discount on your program/course. Send this out quickly, within a few hours of your call ending.

Email 2: Remind them about the expiration date for your offer and to make the purchase now before they forget. Also mention the discount. Send this out 12 hours after Email 1.

Email 3: Send a final reminder urging them to make the purchase before the doors are closed Repeat the deadline. Send this out 5 hours before the offer expires.

Email 4: Similar to Email 3. Send a final reminder with a last minute urgent push. Send this out 1 hour before the offer expires.

This type of series is easy to set up in any autoresponder on the market and you can even add more messages to this series, especially if you still have more than 7 days before your offer expires. Consider adding a reminder email every day, highlighting the solution that you're selling to your customers' problem. Also highlight your program's features and what your prospect will gain from the program. If you're doing one last push in the final week, send an email with a reminder about your livestream video talking about all the reasons why your past clients loved this program and what they gained from it.

The possibilities are endless, you just have to set up the series and activate them to deliver at certain intervals. One important note: Be firm with your deadlines and explain clearly what those deadlines are. Urgency sells! Use strong action words instead of passive voice. Don't tiptoe around the subject; explain very clearly what you're offering and why it's an awesome deal.

In the world of automation, Deadline Funnel is an interesting software which works to hide your offer as soon as it expires so you don't get stragglers the next morning redeeming your expired offer. We've all seen that happen, right? An offer expires at midnight but the seller didn't log in until 9am the next morning to take the offer down. Deadline Funnel automates this process so there's no need to take your offer page down; Deadline Funnel hides it for you.

If you want to add more urgency to your email series, include the Deadline Funnel countdown timers to your emails. Simply set up the integration with your email provider and you're ready to use Deadline Funnel. Between that countdown visual and your strongly worded subject line, you'll get readers opening and clicking on your links quickly.

Creating a follow up email series for any product launch is a good habit to start. You'll also need a follow up series for all those prospects who turned into customers after buying your program. After your program doors close, you can create a separate follow up funnel for all those prospects who came on the discovery call but who didn't buy. You may never know why they didn't buy (or maybe they'll spill the beans if you ask nicely) but that doesn't mean they can't find value in one of your other products.

Exercise: Plan your email follow up series.

Email Sequence	Subject/Topic	Call to Action

Exercise: Brainstorm multiple subject lines using strong action words and urgency.

Email Number	STRONG Subject Line	URGENT Call to Action

STEP FIVE: MAKE IT URGENT! SET A TIMELINE FOR CALL SIGN-UPS

Your program has a closing deadline but so should your discovery call sign-ups. Even if your screening page is always open, don't advertise that fact or you'll be inundated with questionnaires year round. Instead, tell people that they have X days or hours to sign up before you close the doors for discovery calls.

Why is this important? Simply because you don't want to drag out the process waiting for people to take action. You WANT to attract the quick action takers; they will quickly see the value in your program and won't want to miss the chance for a discovery call. You also don't want a slew of slowpokes who decide to fill out the questionnaire the day before you want to close the doors on the program, expecting discovery calls. Setting a timeline and clearly expressing each deadline along the way yields fewer complaints from prospects.

Here are some tips for making this sign up process easier:

1. Decide on your timeline: How long after your webinar/video series airs can people sign up?
2. Write another email series to send to those who watched the webinar/video.
3. Send them a link to watch the replay.
4. Send them a reminder to sign up with deadline.
5. Send a final reminder, saying this is their last chance to get a slot!

With THIS email series, you're focused solely on getting the discovery call booked. Don't worry too much now about touting the benefits of your program; they need to get the call booked before you worry about selling.

While you're in this search process, any questionnaires which do come in should be reviewed and scheduled as soon as possible. Or gather a bundle and review them with your VA all in one day or afternoon. Allow plenty of time to schedule all the calls as some people may have trouble meeting at one of your available times. Also consider if you want to spend all day long on discovery calls or if you prefer to mix up your tasks each day.

You can also approach people directly who you think are your ideal clients and who you think would greatly benefit from being in your program. Simply approach them and mention why you think they'd be the perfect person for this program. It could be they didn't know about your program or maybe they talked themselves out of making a purchase. Either way, it's another conversation to have and a way to nurture the relationship. And of course, there's a right way and a wrong way to approach people with this question. Spamming all your social media contacts is WRONG but sending individual messages or emails to a select few is acceptable.

Exercise: Create a timeline calendar for when you will close out discovery calls and when you'll close the program.

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Day 14
Day 15	Day 16	Day 17	Day 18	Day 19	Day 20	Day 21
Day 22	Day 23	Day 24	Day 25	Day 26	Day 27	Day 28
Day 29	Day 30	Day 31				

Important Dates:
- When does lead magnet release?
- When will you schedule discovery calls?
- How many days of discovery calls?
- What's the deadline for submitting questionnaire?
- What is the final purchase date for program? (All discovery calls need to be finished before this date.)

STEP SIX: PUT YOUR DISCOVERY CALL SYSTEM ON AUTOPILOT

For a business to keep growing, it needs a constant flow of prospects looking to become coaching clients or to buy a product. Without prospects, you're always scrounging for leads and sounding desperate while doing so.

Automation can make your discovery call process amazingly easy. Let's discuss how to create this autopilot system for varying formats of lead magnets.

Video Series/Webinar

You've created your series. You've held your live webinar. Now what? The first step in automation is making your video/webinar evergreen. This simple form of repurposing your video content simply means you're reusing the content multiple times. Evergreen means that the topic is not outdated or seasonal.

EverWebinar is a platform that turns your videos and webinars into evergreen replays, all with the look and feel of a live webinar. You record your webinar/video series, upload it to EverWebinar, and then create the webinar settings so prospects can watch the webinar on their own schedule. These types of webinars are also called on-demand because of the ability to choose the most convenient time. EverWebinar also has the standard webinar registration form so new viewers need to send their email to you in order to see the webinar/video series.

Now you choose how frequently you want the webinar to run. Because you have discovery calls as your next step and you don't want to be bombarded with them all at once, I recommend airing the webinar once per month or at some other regular interval that works for you. Regular intervals allow you to schedule discovery calls at an even pace without feeling stressed or overbooked.

At the close of the webinar, people will see the message about signing up for a free discovery call. Direct the viewers to your questionnaire page. From there, they will fill out the questionnaire (or not) and you'll continue with your discovery call scheduling process.

Digital Downloads

While videos and webinars have better conversions, you can always produce a digital download as your lead magnet as a means to direct people to your discovery call questionnaire. Delivering digital products is relatively easy: Upload the product to your chosen cloud storage, share a link in your email series, and allow the subscriber to download.

Include links throughout your download leading to your screening questions and continue with the reminder emails about any approaching deadlines. Also keep in mind, when you're ready to produce a webinar, simply direct this list of digital download recipients to watch the video; then continue the process of directing them to the questionnaire, discovery call, and paid program.

Automating Your Web Traffic

Running Facebook ads is one affordable way to automate traffic to your lead magnet. Set your demographics/audience, decide on a budget, create a compelling ad, and all your VA needs to do is track how much traffic you're getting from those ads.

Also consider using a social media scheduler like Meet Edgar which allows you to post at your desired frequency but also auto posts evergreen content so it never looks like you took a day off. Even better: Hand off the post scheduling to your VA for an almost hands-off approach.

If you love social media and truly want to capitalize on its power, run a contest using one of the many contest apps available. ShortStack is a well-known app that allows you to build attractive, interactive social media contests, quizzes, and landing pages all within one dashboard. They also offer email marketing services so you can stay in touch with these new leads.

Another way to consistently direct traffic to your webinar is by creating a new autoresponder series for new subscribers (who opted in from your website or social media tab) with a link to the evergreen webinar page. Some of these subscribers may not be aware of your webinar while others may need a reminder call to action to get them there.

Automating Your Discovery Calls

There's no way to take YOU out of this equation but you can certainly make the process easier with some simple tools.

Calendly is one of many online appointment setting tools that allows you to set your meeting schedule and then let your prospects choose the date/time that works best with their schedule. The best part is the lack of back and forth emails!

An email autoresponder will become your best friend when it comes to staying in touch with prospects. Once your prospect is scheduled for a call, setting up a few simple reminder emails ensures that both parties will be present for the call. Handing these pre-written notes to your VA gives you another hands-off task.

Likewise, your autoresponder will be a lifesaver when contacting all your paying customers and keeping them separate from your other prospects. Segmenting your email lists is a way to keep the messages they receive on point and most autoresponders allow that quite easily.

By adding some forms of automation to your plans, you're always getting new discovery call leads!

Exercise: Investigate how to automate your prospecting and discovery call processes.

Automate Traffic	Automate Discovery Calls
○ Facebook Ads ○ Social media scheduling software ○ Contest software for social media ○ Autoresponder series for new subscribers ○ Other:	○ Calendar app ○ Autoresponder series for call reminders ○ Other:
Automate Your Lead Magnet	**Other Brainstorm Ideas**
○ Autoresponder ○ EverWebinar ○ Other:	

Exercise: Plan an email series for each scenario below. Include number of emails in the series, calls to action, deadline reminders, and subject lines.

For New Subscribers – Direct to Lead Magnet
For Prospects with Discovery Call Scheduled
For Your Digital Download Delivery

Need extra help? I've got you!

Working with someone who's, been there, done that can make all the difference when you're feeling a bit overwhelmed.

Yeah, I'm your crash-test dummy and can help you get through the tough spots in your business.

Whether you're not sure on the techie parts or whether you need help getting out of your head and into focus and action, I'm your coach!

Let's talk. Simply **click here to apply to work with me** and we'll talk about where you are in your business and where you REALLY want to be then work together to make your goals a reality!