



5-Step Authentic Sales Call Sequence

Use this proven questioning framework to powerfully enroll new clients through your consultations and enrollment conversations.

Edit this to feel more “you” but be sure to keep the question sequencing in tact as this is all part of the magic ☺

1. WARM INTRO

Share your intention for the call and ask their intention for what they would like to receive.

Ex. So excited to connect with you! My intention is to help you get more clear on what you want, identify anything standing in your way, and identify your next steps. How does that sound? Is there anything you'd love to receive from this session?

Alternate opening questions:

What would make this a powerful session for you?

What inspired you to reach out today?

2. DISCOVER DESIRES, VISION and OUTCOME

So, NAME what is it that you want? Or in other words, if you could wave a magic wand and really get what you want in the next 1-3 months, what would that look like?

(WRITE DOWN THE CLIENTS EXACT WORDS so that you can repeat it back to them)



What will **having that** do for you? (you can ask this 3 times or some version of the following questions to get to the heart of what they REALLY want)

Alternate Questions to go deeper:

Wow! What would unfold for you then (in your relationship, work, social life, in your finances)?

OR

What could you do in your life that you can't do right now?

What would that feel like?

How would it make it make a difference in your life (and other important people in your life) if you got this outcome? (If you had _____, _____ and _____?)

What would be the best part of that?

3. DRAW OUT THE PROBLEM

What's stopping you or slowing you down from having ___(desired outcome)___ right now?

Additional questions (don't draw this out too long, just identify the 1-3 big things keeping them stuck)

Can you tell me a little more about that? What's your biggest challenge with that?

How has _____ impacted your daily life (work, relationships, finances)?



What has worked for you in the past?

What did you like about it?

What didn't you like about it?

4. REFLECT AND SUMMARIZE

So what I am hearing is that you want move away from: _____ (what's holding them back/current state/"Point A") and that you want _____ (what they want/vision/future state/"Point B")

Does that sounds about right?

(OPTIONAL: Am I missing anything that should be addressed?)

5. OFFER SOLUTION + INVITATION

Great. Would you be interested in hearing how we could work together to get you past _____ and start _____ (**RESULTS!**).

OR Are you interested in hearing how I can support you?



Ok great! Working together we will..... (brief description of getting from A to B
ex. walk you step by step to help you lose the 20 pounds in the next 3 months in
a way that feels doable, sustainable, and like a lifestyle rather than a diet)

(Outline the steps of your signature system or the 1st 2nd, 3rd etc steps that they
will need to take to get where they want to go AND THE BENEFIT "so that...")

First we would _____ so that...

Then we would work on _____ so that.

Then _____ so that...

Then _____ so that...

And Finally we would _____ OR and in addition to all this we will also
_____ so that...

*Write this out for your program/product.

CHECK IN: Curious, what is resonating with you most so far?

**ASK FOR CONSENT TO MOVE FORWARD: Great! Would you like to
hear more about how this would work?**

Explain options: ex.3 month, 6 month, 12 month, when you meet, for how long
etc. and by the end of your program you will have _____ (RESULTS).

**MAKE THE INVITATION: Does this sound like something you
would like to do?**



IF THEY SAY YES...

GREAT!! YAY! I am So excited to work with you! When would you like to get started?

Fantastic. I have an opening on _____ at _____. Otherwise we can start first thing _____ morning.

(GET THIS DATE ON YOUR CALENDAR! THEN DO YOUR ONBOARDING EX. WELCOME EMAIL WITH PAYMENT LINK OR WALK THEM THROUGH PAYMENT ON THE PHONE, ASK FOR ADDRESS TO SEND GIFTS, SEND CONTRACT ETC**)**

IF THEY SAY "NO"...

Let them know you totally understand and appreciate the transparency. You can share that you've so enjoyed the conversation and you might even recommend another practitioner or book or other action step to support them in the meantime.

IF THEY SAY "I'M NOT SURE"...

TROUBLESHOOTING MONEY OBJECTIONS

First, empathize

I hear you. I totally understand.

Figure out: Is it really about the money?

Money aside, does this feel like the right fit for you, or is there something else you need?

(If it is really about the money you can let them know you would never want to put them into a place of _____ (fear they have around the money ex. Not being able to pay the rent etc) AND I know how important this is to you and how much you want this. *Then offer payment options/programs* - I don't want the financial



piece to get in the way of getting the support you needs, so what if we broke up the payments into X over X months? OR I also have X program that is a slightly lower investment and will help you get XYZ (how it will help them).

Do they need more information?

Now I don't do this for everybody, but is there any additional information, references, anything, that I could share with you that would help you feel comfortable taking this next step in your life?

Do they need more time?

I totally get it, I a visual person, I like to look things over and really take my time with a decision, so let's do this. I'll send you some more information for you to look over, and then we can hop on the phone tomorrow so that I can answer any additional questions. Does that work? Great! (set time right there and then).

(Then in the meantime send an email with all the benefits of working together, outline how it works, the investment and payment options, and any homework/ journal prompts to help them get more clear).

IF NOT AN IDEAL CLIENT:

So, NAME, I've got to let you know that I'm getting the sense that I might not be the best coach for you at this time and that's because [it sounds like you need/ are looking for _____ and _____ and in all honestly I'm not the best person to help you (solve that problem) because _____. And I don't want to take your money if I can't get you the exact results you're looking for! [pause to let it sink in and see what they think -- they may agree with you!]

How about this? As soon as we hang up, I will email you some other resources/ coaches/books that I think can help you with what you're up against, so you can get what you need. Would that be okay?

Ok great! I will send that email to you as soon as we get off the call. It's been really wonderful talking with you and I am so grateful that we had this chance to connect. Do you have any other questions? I wish you the very best. Thank you so much. Take care.