

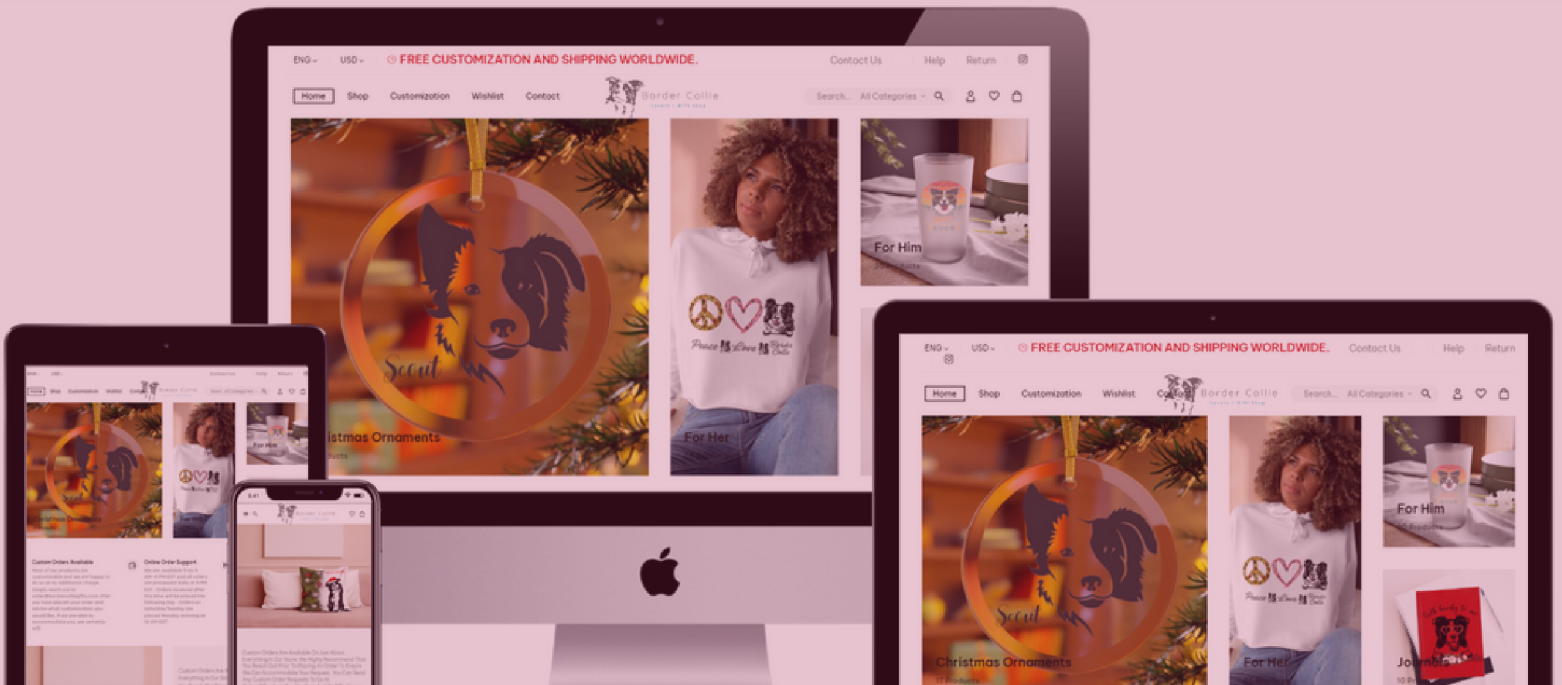


# Everything Digital

# BUSINESS DEVELOPMENT

# Planner

Build the foundation of your business



# IDENTIFY YOUR WHY

Why do you want to start or why did you start your business?

What is your personal mission?

What are your values?

How will you (or have you) infuse/d your values into your business?

What is your favourite part about your business?

# HOW DO YOU SEE YOUR BUSINESS?

What is your niche and how do you want to be seen? How do you not want to be seen? Get specific!

What do you need your audience to know?

How would you like to communicate your message?

If you had to communicate everyday with your audience, what would you say?

what do you do to keep yourself energized?

# YOUR GOALS

What is the first step you can take towards starting and/or growing your business?

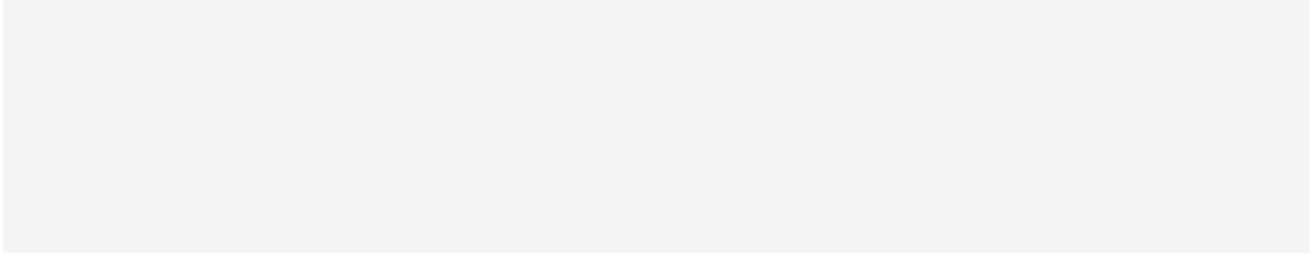
How long will it take you to complete this step?

What action can you take daily towards this step?

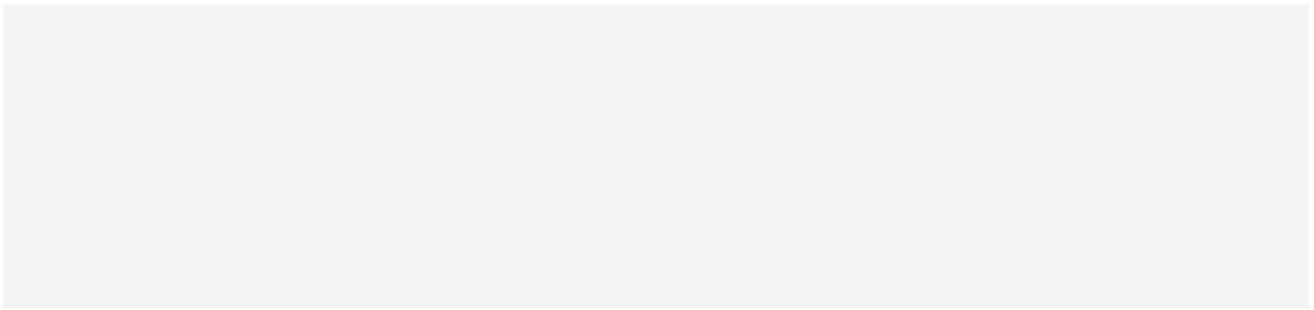
What is your ultimate goal?

# YOUR TIME

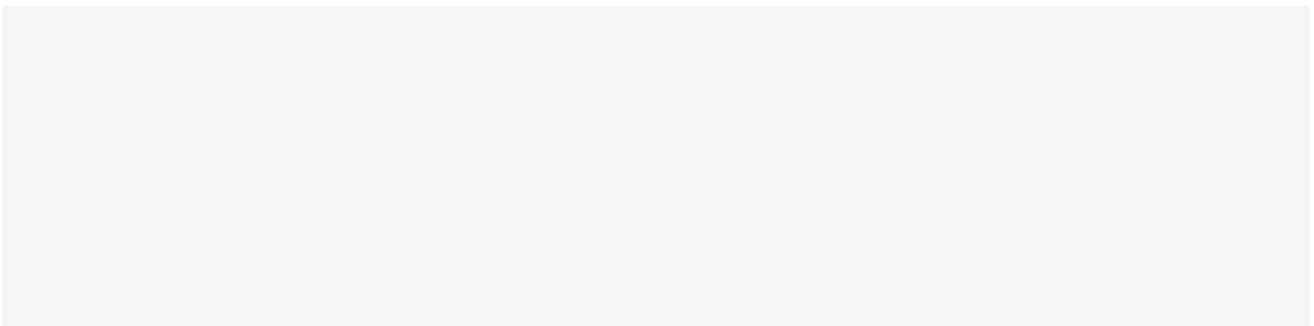
How much time can you dedicate to your business per week?



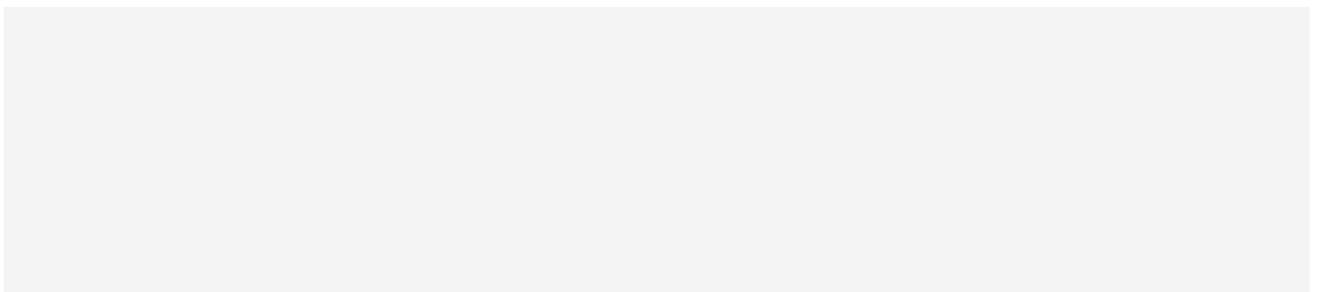
What is your time management strategy?



What will get in the way of you making this time?



How will you overcome this obstacle?



# YOUR IMPACT

Who do you want to work with?

Why do you believe this segment is your market?

How will you find them?

Why will they choose you?

# MARKETING STRATEGY

Who do you want to work with?

Why do you believe this segment is your market?

How will you find them?

Why will they choose you?

# MARKETING STRATEGY

How do you plan to be visible?

How have you seen others in your industry become visible?

What platform would you like to use? Why?

On a scale of 1 to 10, how committed are you to getting visible and marketing your services? Why?

1 2 3 4 5 6 7 8 9 10



# YOUR IDEAL CLIENT

Time to dig deep and start thinking about who you want to attract! Knowing your ideal customers will help you understand how your services help to their needs and how you can help solve their painpoints.

**GENDER**

**AGE**

**LOCATION**

**EDUCATION**

**INCOME**

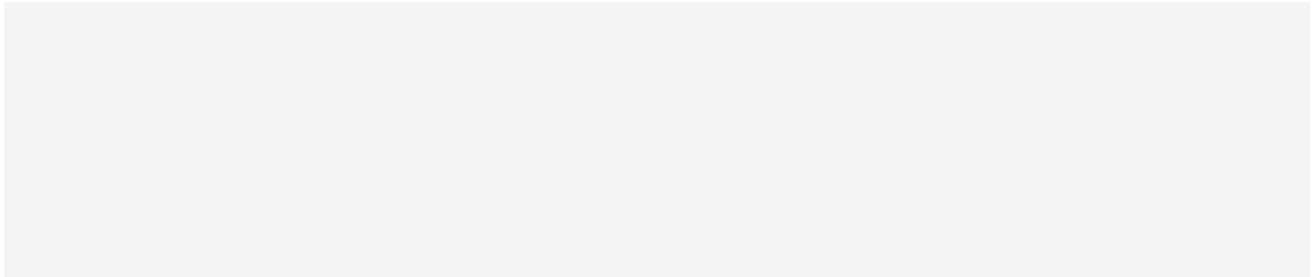
**OCCUPATION**

**What do they do in their free time?**

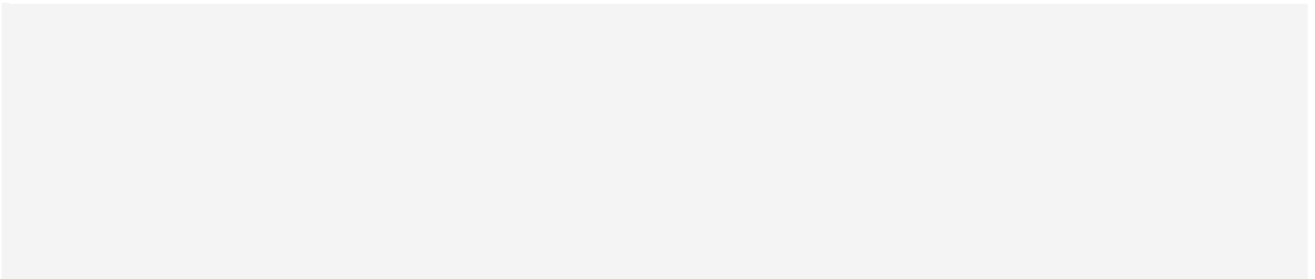
**What are their core values?**

# YOUR IDEAL CLIENT

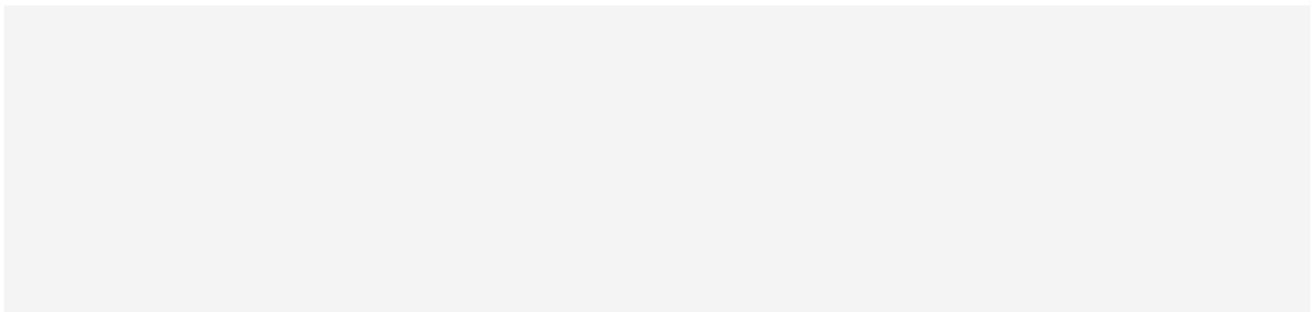
**What is their biggest frustrations?**



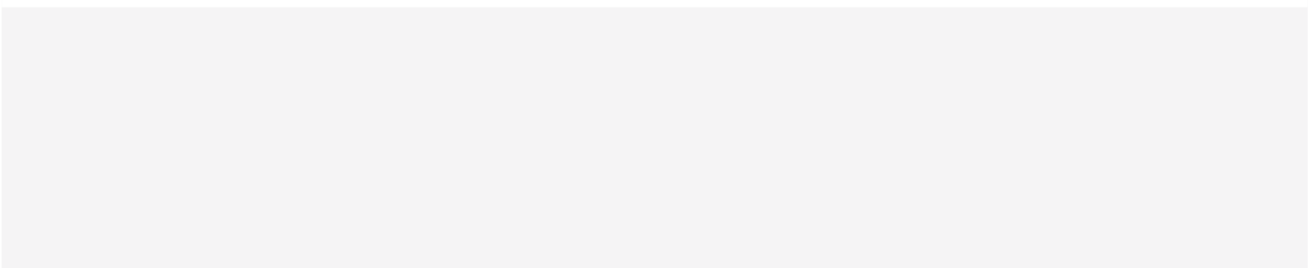
**How can your product/services help them?**



**What would you like their final outcome to be after working with you?**



**What would you like them to say about you when you weren't in the room?**



# DISCOVERY CALL PRE-CHECKLIST

I have researched the client - including website and social media.

I have gathered my pricing and FAQ I often get asked during calls, and have them ready to go.

I have my on-boarding steps outlined to tell them during the call.

I have sent them a pre-screening questionnaire to gather what I can help them with, and what packages they need.

I have outlined the top 3 tasks we will discuss during the call.

After the call: Send them pricing, final services quoted, as well as outline the steps to book you and get started.

# CALL QUESTIONNAIRE: OPENING

From the very beginning of the call, it's important that you position yourself as an expert. You can do this by getting right to the point and avoiding a lot of chit chat.

Tell me a little bit of about yourself and your business

What type of services are you looking for?

What's your vision for your business?

A discovery call or a sales call is the conversation where you get to shine. This is the call where the client will decide if you are a good fit for her, and you too will decide if working with the client is a good fit for you!

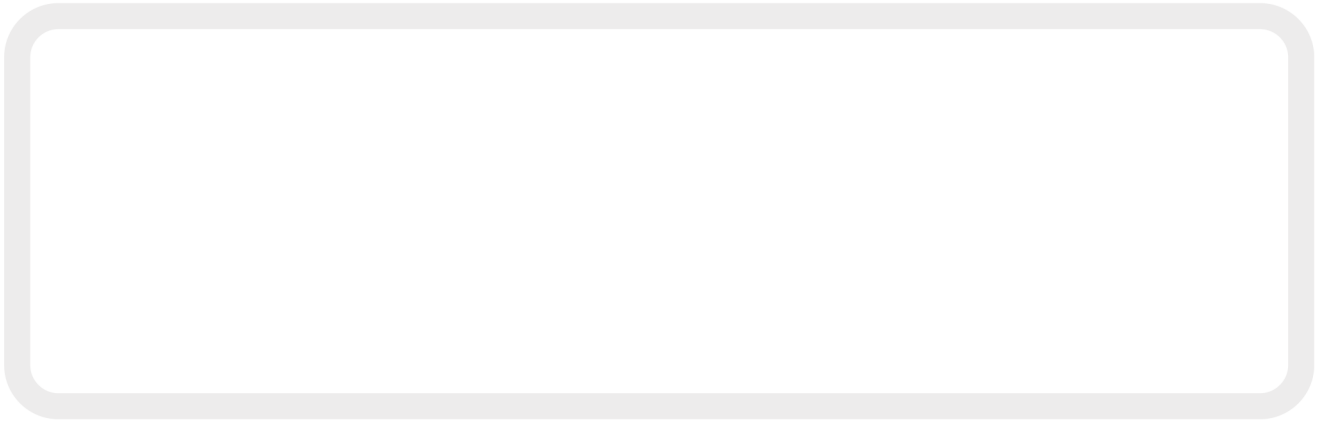
What would you want to get out of our work together?

What is your preferred method of communication?

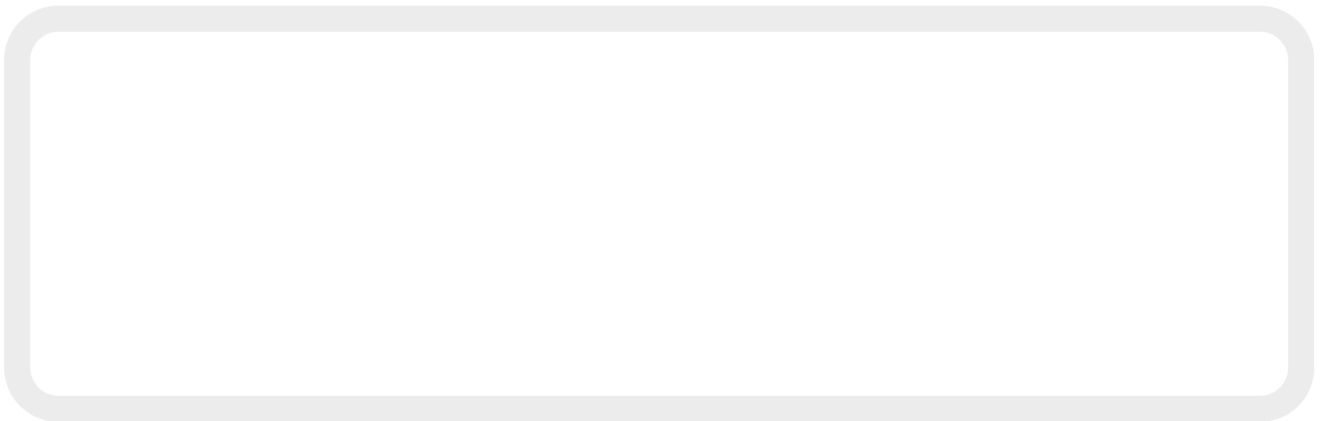
How do you like to work?

Share the potential results of your offer (If you decide to work with me, 3 months later you'll have...)

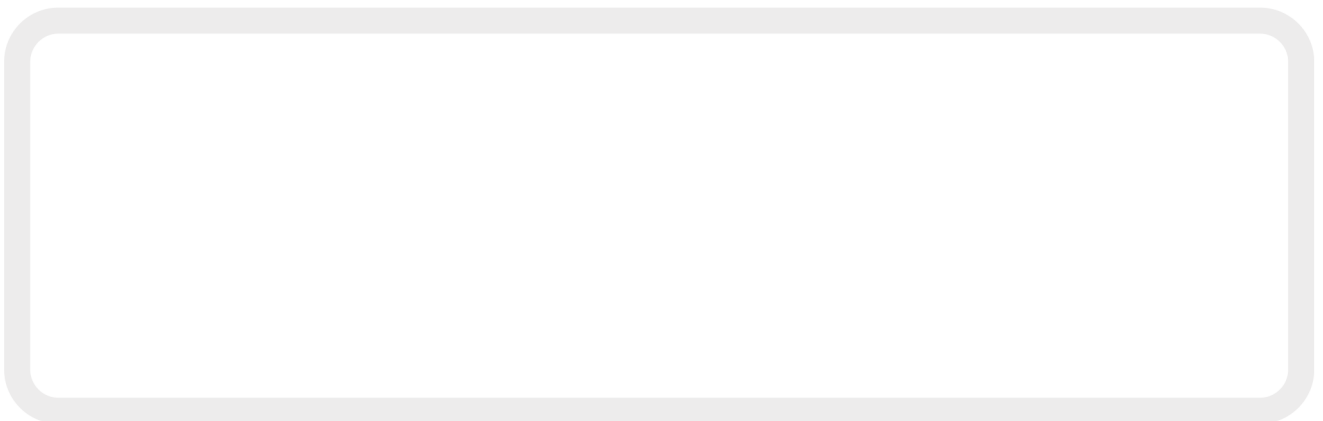
What questions do you have for me?



What current tools are you using?



What is your timeline for this task/project?



You've been told a million times to tap into the pain or the gap, right? Here's the thing, for someone to really make change, and have the motivation, they've got to be aware of what isn't working. This helps them realize that if they continue on in the same way, things are not going to change.

"What challenges are you facing?"

"What's keeping you from getting x, y, z result?"

"What have you tried that hasn't worked?"

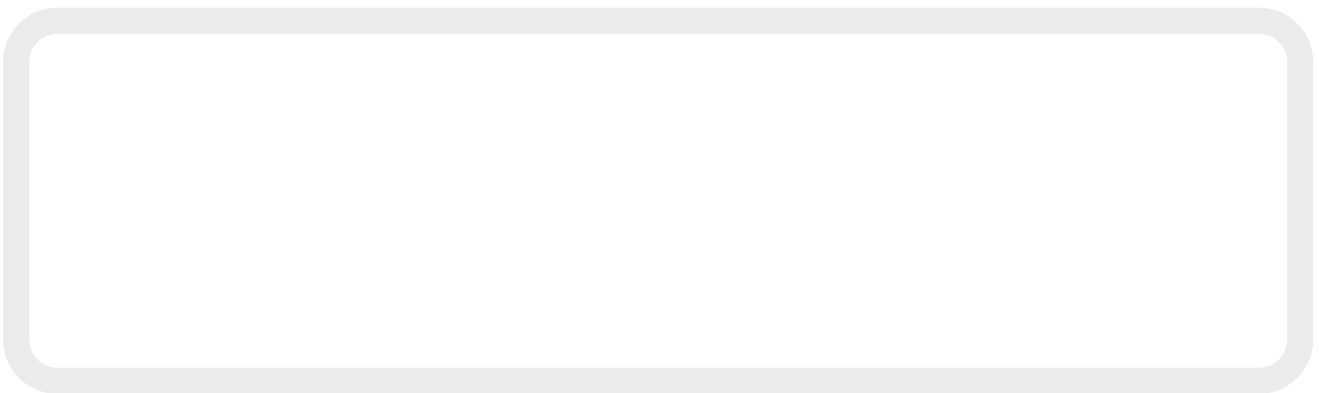
# YOUR CLIENTS DEDICATION

Discovering how dedicated your potential client is, is a MUST! Just like having a sense of urgency, being super dedicated, persistent, and willing to persevere is huge! Change is not easy for many people.

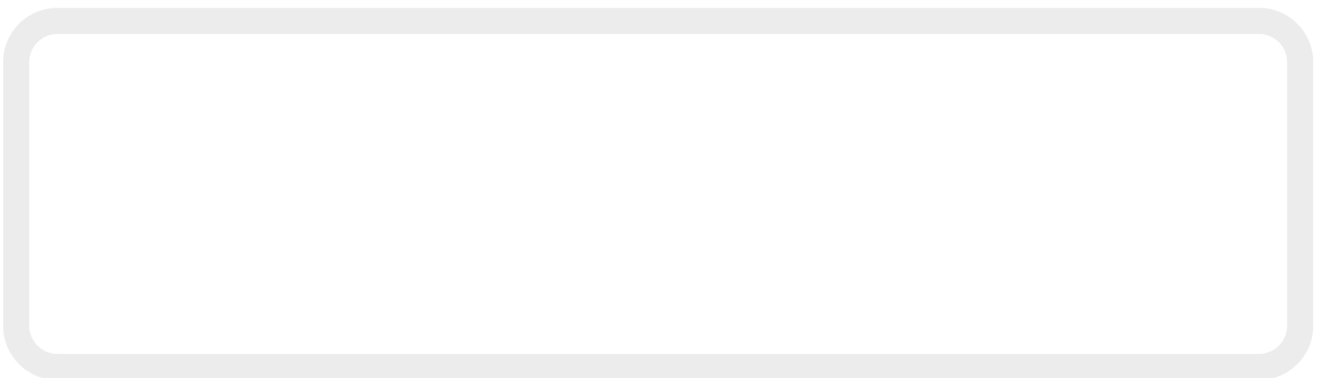
My clients are entrepreneurs, and I know that being an entrepreneur isn't easy every day. I'm sure you know that as an entrepreneur yourself! ;)

To know that my potential client is super committed and willing to do what it takes to make their desires happen, is so very important.

"Where do you imagine you will be in 3-6 months from now if this problem isn't fixed? What does this mean to you? How does this feel to you?"

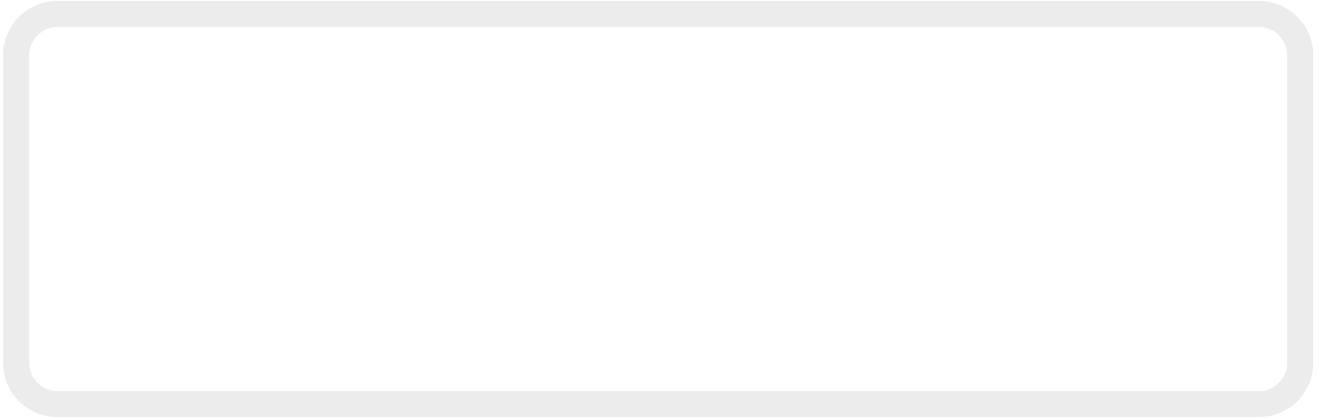


"What do you imagine will happen if you don't take action now?"

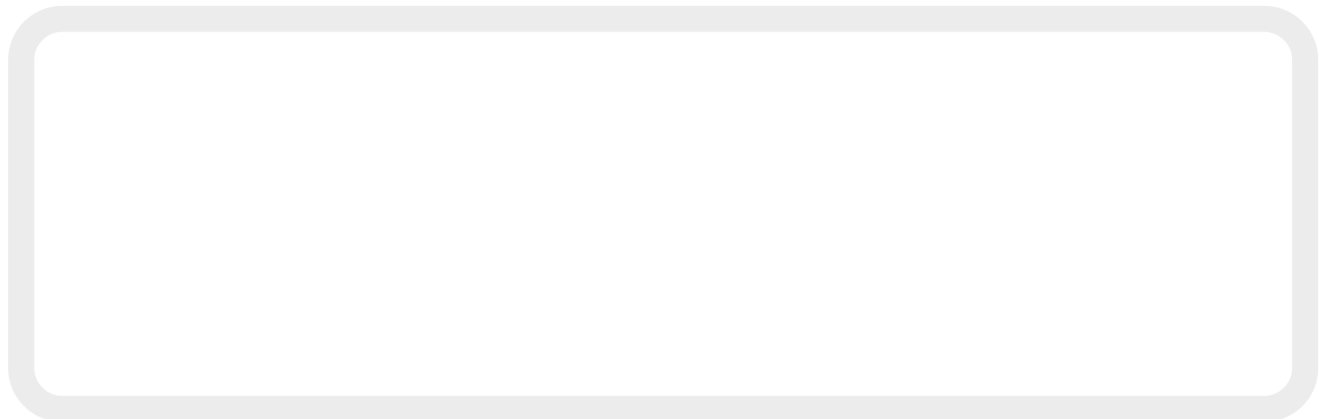




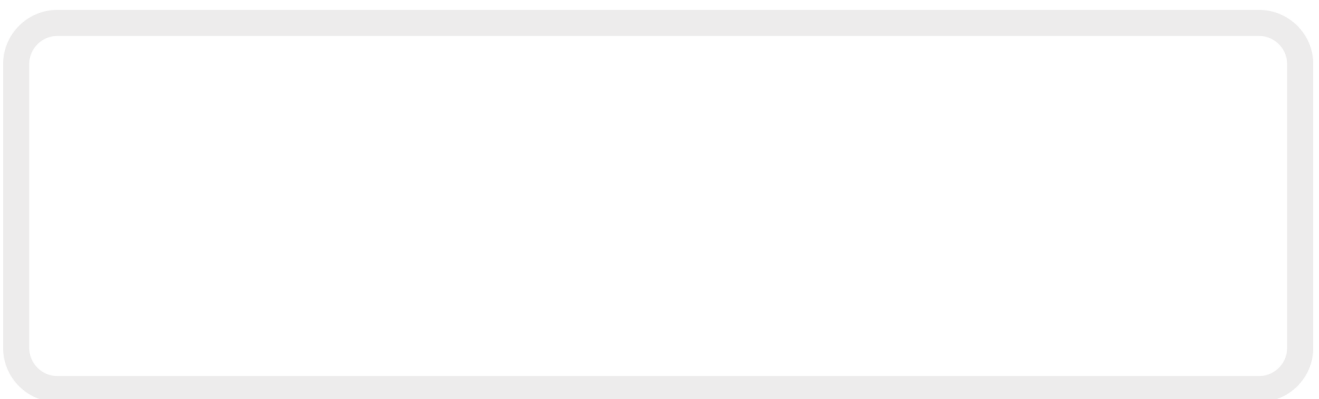
“How committed are you to transforming (your business) in this situation?”



“Are you willing to do what it takes to change this situation?”



“What are you willing to change about yourself and your situation to accomplish your desires?”



# WORK WITH ME

After you've clearly explained to them what working with you looks like, the best thing to do is check in with them, to make sure that your help is what they're looking for. "Why am I the right coach for you?"

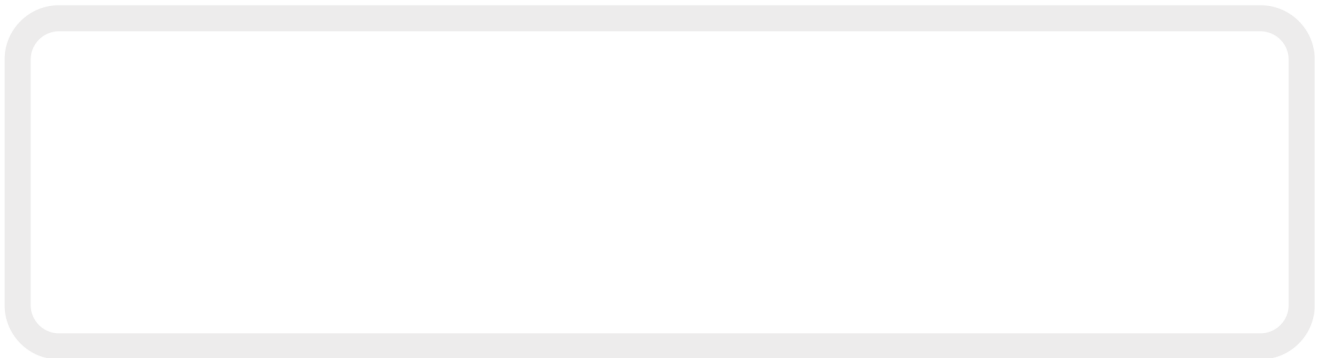
What do you see yourself getting during our work together?

"So this program feels like a great fit to you? What about it feels like a great fit?"

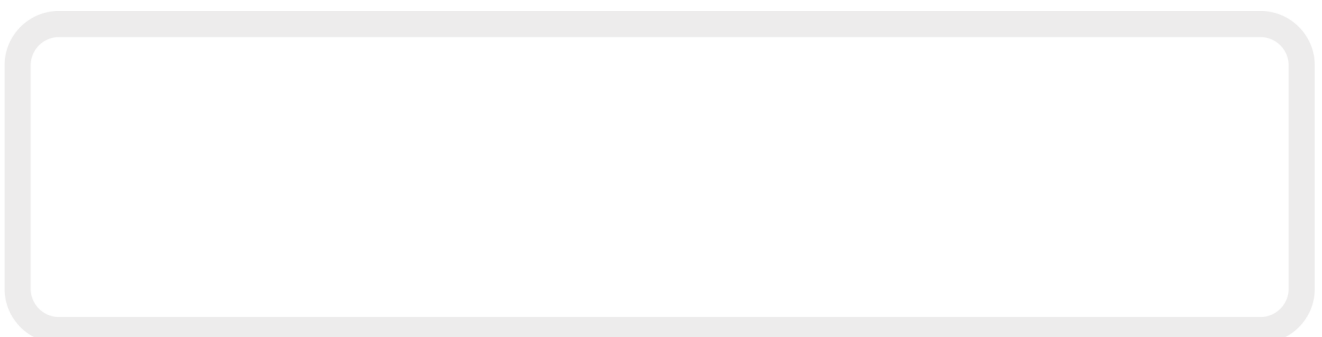
# WELCOME PACK PLANNER

A welcome packet sets the tone for your relationship with your client. The goal of a welcome packet is to let your clients know what to expect, so that they feel prepared for whatever comes up. You will want to describe (in detail) the process of working with you, as well as outline any boundaries you have put in place to make your business run more smoothly.

Break your process into the main steps with a description of each step. Include a time frame for each step. Highlight any boundaries you might have in your process. For example, if you require your client to approve and pay for an item before you order it, remember to highlight that boundary.

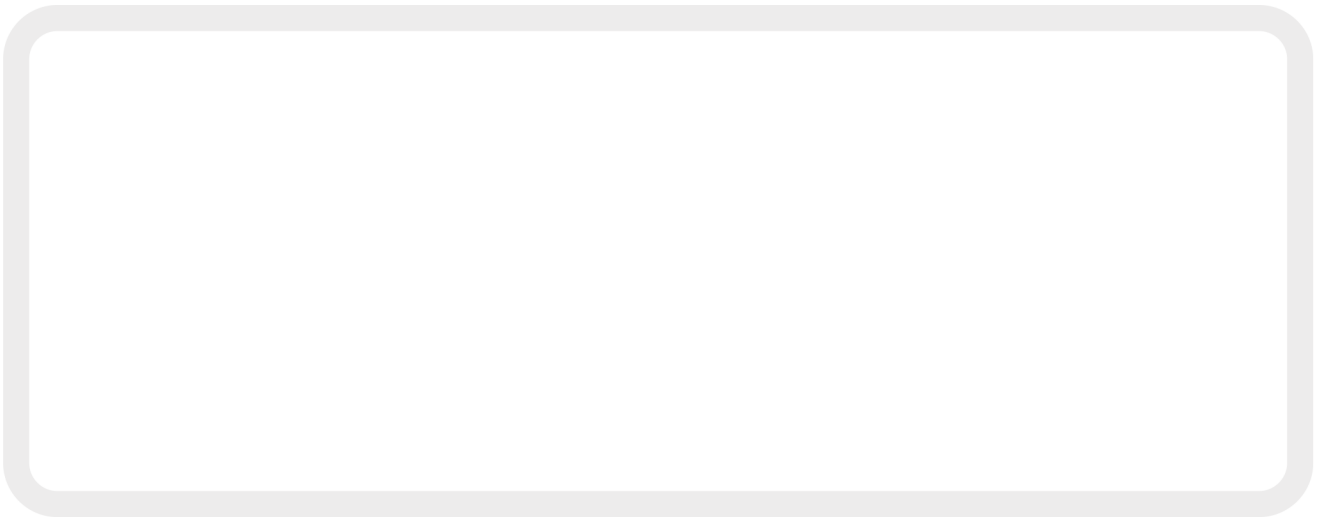


Outline anything and everything that could go wrong. If you are a designer you might talk about items coming in wrong or damaged. Reinforce that this isn't your first rodeo, and you are there to assist. Remind them that sometimes things will go wrong, and that's ok. As long as you prepare your clients for the hiccups, they'll be more understanding when they inevitably happen. What is your process

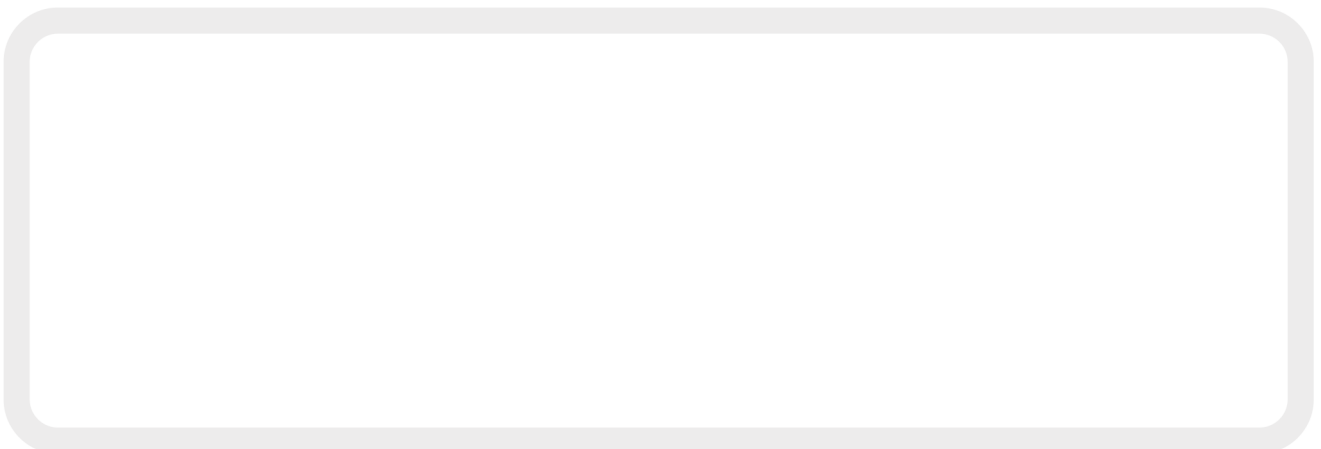


# WELCOME PACK PLANNER

Outline how you would like your clients to contact you. Email? Text? Online client software only? Remember, you get to make the rules for your business, so choose the method of communication that makes your life easiest. If you have a team, you might also outline which email the client should use for particular questions.

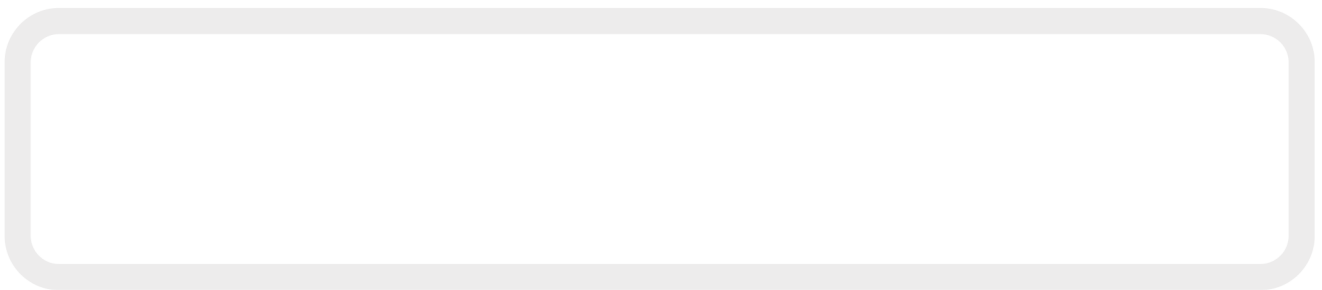


When are you open? This reinforces to the client when it's ok to contact you, so think about when you would like to answer/make calls and take meetings. Are you ready to talk with clients as soon as you get up, or do you need a couple of hours to prepare for human interaction? Are you ok with evening meetings, or do you need to wrap things up by 3:00 to pick up your kids from school? These are all things to take into consideration when letting your clients know your hours of operation.

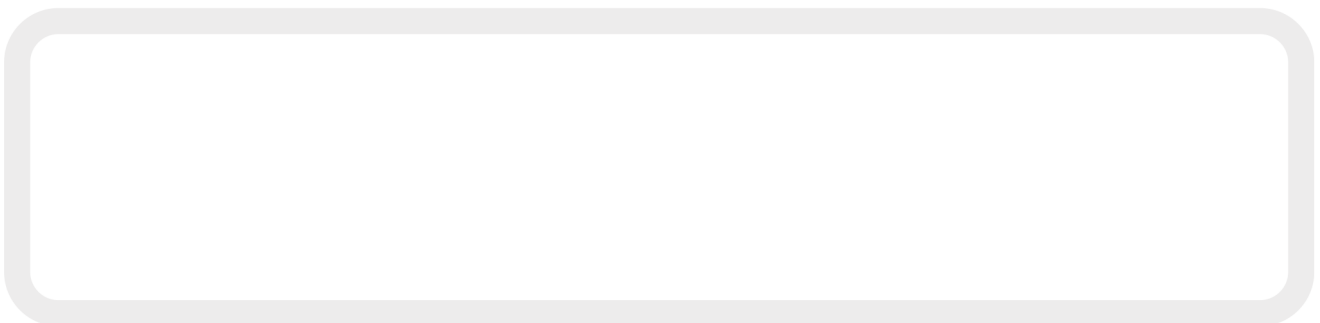


# WELCOME PACK PLANNER

Describe when and how you bill. Can the client expect one flat invoice that needs to be paid up front? Or do you bill hourly and send a weekly invoice? Let the client know what to expect. Make sure you communicate how fast you expect to be paid. Do you require immediate payment or allow a certain amount of time before payments are considered late? Do you have a late fee or any other penalties associated with late payment? Describe these in detail. Communicate the methods of payment you accept.



If there is anything else you want your clients to know, take this opportunity to tell them! Preparing your clients shows them that you know what you're talking about - which will give them more confidence in working with you. Remember the more prepared your client feels for the experience of working with you, the happier they will be with their experience!



Let them know where to find you so they can be invested and excited to be a part of your world!

# THE PROSPECT PHASE

If a client wants to haggle your pricing, they are not a good fit for you. A good client will pay your rate - a bad client will want to negotiate right off the batt. Any inquiry who wants to haggle is a huge red flag!

Yes

No

Are you letting your clients know when they should expect to hear back from you after their initial inquiry?

Do you have an email template that you send to prospects that outlines your services?

I have my on-boarding steps outlined to tell them during the call.

Do you have an investment guide that answers their questions AND pre-qualifies them?

Are you establishing yourself as the expert and making it easy for them to schedule their next steps with you?

# THE PROSPECT PHASE

Yes

No

Are you sending reminders before your next steps letting them know what to expect?

Do your discovery call questions allow you to connect and naturally sell your services?

I have my on-boarding steps outlined to tell them during the call.

Do you send information immediately after you talk to them on the phone?

# THE ONBOARDING PHASE

Yes

No

Is it easy for your clients to sign your contract and pay you?

Do you send them a welcome packet that sets the stage for what it's like to work with you?

Do they know how to use your systems if they have "homework" to submit to you?

Do they know what to expect every step of the way?



# THE OFFBOARDING PHASE

Yes

No

Do you have a process for letting your clients know their contract has been fulfilled?

Do you send them a thank you card or a gift?

Do you request feedback over the phone or in person?

Do you make it easy for them to write a testimonial for you?

# THE OFFBOARDING PHASE

Yes

No

Do you have a process for letting your clients know their contract has been fulfilled?

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Do you make it easy for them to write a testimonial for you?

# HIGH CONVERTING SYSTEM CHECKLIST

## **1. Establish rapport.**

Begin the conversation naturally as you would with anyone else, and express how excited you are to spend this time with them.

## **2. Give them an overview of the session.**

Let them know how you run your sessions so they can sit back and relax without wondering where this call will go.

## **3. Ask permission before you begin the session.**

1) check in with them and ask them how it feels to have this kind of support and

2) inquire whether the two of you should continue to work together at the end of the call if you both feel it is a good fit. This will ensure they don't feel that sales vibe because they know an offer is coming. Not only will they not be surprised, but you can both relax now that permission has been granted.

## **4. Get clear on their desires.**

Where are they now, and where would they like to be?

## **5. Uncover the importance.**

How strong is this desire for them, and why is it so important?

## **6. Identify the obstacles.**

What is in the way of them manifesting their desire?

# HIGH CONVERTING SYSTEM CHECKLIST

## **7. Step into their vision.**

How would things be different if they were able to manifest their desire? How might their life change? What positive impact could they make?

## **8. Check-in and present a solution.**

As promised, check in with them about how they're feeling and tell them you have something you'd love to share with them that might be a great solution to their problem. Make this a benefit-laden, outcome-based description of your service or product.

## **9. Unravel any hesitation.**

Walk through their doubt, worry, concern, or fear about investing in themselves. This is an important time to stand for them with love, compassion, and belief without becoming attached to the outcome.

**While this is an excellent base planner for coaches, counselors, and personal service professionals, it does work for any type of business. You can build marketing strategies for the holidays; for a new market you would like to engage, the premises is the same.**