



THE AUTOMATIC CLIENT  
ENROLLMENT SUPER SYSTEM  
MODULE 7

## Module 7:

# MASTERING THIS PROCESS

This module is about fine-tuning the way you enroll new clients so you get better and better each time. If you want to get anywhere in life (at least, intentionally), you must have a clear and well-defined vision of where you wish to go.

## Inspect what you expect

One of the most effective ways to catapult your success as an entrepreneur is to *inspect what you expect*. What this means is that you have a way of measuring what is and what isn't working; you go through some sort of review process that helps you get better with each enrollment session you conduct.

This is something that those people who acquire tons of new clients every month have learned – that it's essential for us to continue examining what we do and how we do it. Starting and running a business requires you to keep a lot of different things on your plate at one time. At different times, you have to switch between operating in the role of a marketer, presenter, writer, salesperson, and many others.

As you try to juggle all of these things (usually by yourself, at least in the beginning), it's easy to let a few important details slip through the cracks of your awareness. You simply can't pay attention to everything all the time. And without doing an after-session review, you may have no idea that certain parts of your process are going terribly wrong.

Let's say, for example, that you usually close two or three new clients out of every fifteen people you see. But it may only take a very small shift in the way that you do things – one little adjustment in how you present yourself or your offer – to start closing **six** out of every fifteen prospects. Now this would not only give you a huge jump in income, it would also allow you to spend less time on prospecting and focus more on the work that you do and love.

A great way to inspect what you expect is to create your own after-session review form that you can fill out after each prospect leaves your office. On it, you can write down information about what happened during the session – what you think went well, what needs improvement, and what needs to be changed or added.

You can also write down how the client responded to you during different stages of the process; objections they may have had and how you responded to those. Of course, include whether the prospect decided to take advantage of your offer or not. And, if not, then why not – specifically, in the client's words and from your own perspective.

This type of information is like a treasure map to your personal goldmine. Although the idea of conducting an after-session review is very simple, this is an advanced tool that will launch you miles ahead of those who don't use it.

## Have goals

In order to know whether or not you are on track, you have to set goals for your enrollment sessions. How can you ever get to where you want to be (in regard to mastering this skill set) if you don't know where you're going?

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Goals are not just something that we help clients set and accomplish, or use ourselves to realize achievements of great magnitude. They can be powerfully utilized to improve and excel in each and every area of your business.

We recommend that you come up with a tangible number of new clients that you want to sign up on, let's say, a weekly basis. That number might only be one or two people, but you need something solid to work with – a target number of prospects that you expect to become clients. The important word in that last sentence is *expect*.

You have to go into each day and week with an attitude of positive expectancy, as though your success was already 100 percent guaranteed. Does that mean you're going to close every prospect? No, of course not, but we tend to get what we focus on in life. If you go in *hoping, wishing, or trying* to get new clients, you'll just create more experiences that make sure you'll continue to hope, wish and try.

But what about when you *expect* something? You are tapping into a powerful force that creates opportunities for you to experience the best-case scenario more often than not. Of course, those expectations can be let down or not met.

But that's not within your control. Just do your part by setting goals and operating with the full intention of achieving them. By measuring your progress, you will find yourself improving at an accelerated rate.

As a special bonus, below you'll find a form specifically designed to walk you through a review process at the end of each session.

### After session review form

New client goal for this week \_\_\_\_\_ Actual sign-ups so far \_\_\_\_\_

★ Briefly describe the outcome of your last session.

★ Has the prospect signed up for services?

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★ What you believe you did well during the session and why?

★ Identify what you believe didn't go well during the last session and explain why.

★ List some of the things that you think you should do more of in upcoming sessions.

★ What are some things that you think you should do less of?

★ What should you start doing during your enrollment sessions?

★ What should you stop doing?

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★ What part of their process needs to be improved?

★ What needs to be changed or done differently?

As you get in the habit of doing these consistently, at the end of each consultation, you'll start to pick up patterns that tell you what to do when someone responds in a certain way. You will also become more aware of what's going on during each session and develop an instinctive ability to steer people in the right direction.

## How to prequalify your prospects

Savvy professionals typically add another step to the enrollment process. They prequalify leads before having them come in for free consultation. The prequalification process serves three important functions.

- To make sure you only consult with people who fit into the design of your program.
- To draw those people into your marketing funnel that you'd like to work with.
- To weed out people who either can't afford you or wouldn't receive a large enough return on investment to justify the expense.

The first step to prequalifying your prospects was actually done earlier; when you located a highly targeted niche. When you solve a very specific challenge, or you systemize a way of achieving something that only a certain type of person wants, you're already narrowing the field.

For example, let's say you offer financial planning services for fathers who run a business from home. Well, let's just take a look at that criteria. First, your client is going to be male. He's also going to be a man who has at least one child. Thirdly, your prospect is an entrepreneur. And, beyond that, he's also trying to operate a home business.

Can you see how – just by being very specific about what it is that you want to do for people – you already have a number of prequalifying questions to ask your prospective clients? That brings us to an excellent tool that you can use to expedite this process, the *prequalification questionnaire*.

### The prequalification questionnaire

The prequalification questionnaire is a form you send out to prospects who are interested in what you do and have asked for more information, either via your web page or maybe at an event you were speaking at.

Of course, you only send this form to people after you've offered them some free gifts and done some work to build up the relationship and earn their trust. But, when you finally make the offer and a certain number of people respond, that's when you send out the prequalifying questionnaire.

This is where the selection process actually begins, because only people who are genuinely interested are going to make the effort to fill out the questionnaire and send it back. So at this point, you begin that process of filtering out the bad leads. Those who do fill it out are much more likely to hire you, and they're probably people who are more committed about getting the results you promise.

By using this method, you're actually going to decrease the number of consultations you have. However, the ones that you do conduct will be much more effective and more likely to convert prospects into paying customers.

This is kind of like a *next step* maneuver in regard to what it takes to set up and operate a successful practice. You may want to start doing this only after you've gained some sort of credibility in your field and a reputation for producing results. When you first start out, it's best to conduct as many consultations as you can, so you can practice and polish your style. When you start building up your reputation and seeing a lot of people, you'll want to be more economical with your time and more selective about who you choose to work with.

### Sample prequalification questionnaires

In the following pages are several examples of how to format a prequalification questionnaire to fit a variety of service industry niches.

#### ★ Marketing consultant

##### ➔ General information

Name: \_\_\_\_\_

Primary phone number: \_\_\_\_\_

Best contact day: \_\_\_\_\_ time: \_\_\_\_\_

Email: \_\_\_\_\_

Business name: \_\_\_\_\_

Type of business: \_\_\_\_\_

Location of business (state/city): \_\_\_\_\_

Business website URL: \_\_\_\_\_

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### ➤ Marketing questions

➤ How did you hear about me?

➤ How long have you been in business?

➤ How many hours a week would you say that you currently spend on marketing your products/services?

➤ What methods have you been using so far?

➤ Do you consider your current marketing strategy to be effective, ineffective, or somewhere in between?

➤ How long have you been aware of the need for improvement in your marketing?

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➤ Is there a chance you may go out of business if you don't find a way to start drawing in more customers soon?

➤ When it comes to running your business, what do you consider to be your primary responsibilities?

➤ What would you like the next stage of evolution for your business to be?

➤ Are you satisfied with your ability to generate quality leads?

➤ Where have you been looking for help with your marketing?

➤ About how many promotions or special offers do you make per month to your new and existing customers?

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➤ What is the typical conversion percentage of each offer?

➤ Do you occasionally send out surveys in order to determine what types of products/services the market wants you to create?

➤ What do you believe are some of the things that prevent you from having a higher conversion rate?

➤ Do you currently have a specific marketing budget?

➤ Approximately how much is that?

➤ How are those funds distributed between different marketing channels?

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➔ What kind of return on investment do you think you're now getting from your current marketing strategy?

➔ What kind of return on investment do you want your marketing to generate?

### ★ Agent/broker

An agent or broker is someone who brings sellers and buyers together. They're the middle person who puts the right conditions together for a win-win deal to take place between people. If you're in such a profession, then you know the frustrations of chasing around *dead leads* and of following up with clients who really aren't serious about doing business.

The following questionnaire will help you determine whether or not a prospect is genuinely interested and motivated to work with you.

#### ➔ Contact information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Preferred method of contact: \_\_\_\_\_ Time of day: \_\_\_\_\_

Preferred date of appointment: \_\_\_\_\_

#### ➔ Goals and motivations

➔ Why are you selling?

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➤ When would you want me to begin the process of matching you up with a buyer?

➤ Is selling right now something that you want to do, or need to do?

➤ How motivated are you to sell, on a scale from 1 to 10?

➤ How quickly do you want to sell?

➤ Are you currently interviewing any other brokers regarding this matter?

➤ Are there any special concerns that could possibly inhibit the transfer of ownership between you and the buyer?

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➤ Does anyone else have a financial stake or interest or possess partial ownership of this commodity?

➤ How much money are you looking to get out of this deal?

➤ How flexible are you with that number, on a scale from 1-10?

➤ Are there any special considerations or upgrades that you believe would increase the value of your \_\_\_\_\_?

➤ Is it in need of any substantial repairs and, if so, what are they?

➤ If I was able to close this deal for you very quickly and get you paid in all cash, what is the very least that you could accept?

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➔ Do you have any questions for me?

### ★ Financial adviser

In order to properly advise you on matters that affect your financial independence, your adviser needs you to be open, transparent and completely honest about your financial life. Therefore, please fill out the questionnaire below as thoroughly as you can.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Preferred contact method: \_\_\_\_\_ day: \_\_\_\_\_ Time: \_\_\_\_\_

Marital status: \_\_\_\_\_

Spouse's name: \_\_\_\_\_

How long married (if applicable): \_\_\_\_\_

### ➔ Number of children or other dependents:

#### ➔ Dependent 1

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Children (Y/N):  Yes  No

Children's names: \_\_\_\_\_

Children's ages: \_\_\_\_\_

#### ➔ Dependent 2

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Children (Y/N):  Yes  No

Children's names: \_\_\_\_\_

Children's ages: \_\_\_\_\_

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### ➤ Dependent 3

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Children (Y/N):  Yes  No

Children's names: \_\_\_\_\_

Children's ages: \_\_\_\_\_

### ➤ Dependent 4

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Children (Y/N):  Yes  No

Children's names: \_\_\_\_\_

Children's ages: \_\_\_\_\_

### ➤ Dependent 5

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Children (Y/N):  Yes  No

Children's names: \_\_\_\_\_

Children's ages: \_\_\_\_\_

### ➤ Other dependents

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Children (Y/N):  Yes  No

Children's names: \_\_\_\_\_

Children's ages: \_\_\_\_\_

### ➤ Employment

Current occupation, position, or professional title: \_\_\_\_\_

Self-employed (Y/N):  Yes  No

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Employer/company name: \_\_\_\_\_

Employer city and state: \_\_\_\_\_

Years in current position: \_\_\_\_\_

### ➤ **Goals and motivations**

➤ What areas of finance are you most interested in improving? (Estate planning- Increasing cash flow – Budgeting - Planning for retirement - Investment portfolio - Minimizing taxes - Child college fund).

➤ If you are motivated by another goal that is not listed below, please describe it in the space below.

➤ What is your idea of financial freedom?

➤ What would you like your financial situation to be like twelve months from now? Three years? Five Years?

➤ What are your biggest financial obligations at the moment?

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➤ What do you anticipate to be your biggest financial obligations in either the near or distant future?

➤ Do you have any habitual ways of managing or spending your money that you believe may be having a negative impact on your ability to build wealth?

➤ Are there any family influences that inhibit you from achieving financial freedom?

➤ On a scale from 1-10, how motivated are you to change the circumstances described in your responses to questions 7 and 8?

➤ On a scale from 1 to 10, how open are you to receiving guidance and following advice from a trained financial adviser – even if that advice goes against conventional wisdom?

➤ Do you currently have an investment budget? How much?

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➤ What is your current annual income/salary?

➤ Do you expect any significant changes in your income over the next twelve months?

➤ When do you want to retire?

➤ How much monthly income do you want to receive after you've stopped working?

➤ On a scale from 1 to 10, how motivated are you to achieve your financial goals?

➤ Any questions for me?

## Mastering your mindset 2 – Mastering your state

We've already covered a great deal of content in this program, but it gets even better from here. This section is going to be about mastering your state; about taking control of your *inner game*. Essentially, we're going to talk about how you can change what you are doing –inside of you – to enroll many more clients more easily and regularly than ever before.

Mastering your state can be broken down into a few distinct, yet very integrated, parts. The first has to deal with developing and strengthening the mental qualities that empower you to succeed. These are things like believing you are competent and skillful – an expert at what you do – knowing that you have something that separates you from the rest, and that you're worthy and deserving of success.

The second part is about removing things like self-doubt and fear of rejection – feeling anxious about having the money conversation, things like that. Maybe a part of you is afraid you will start using this process to manipulate people. We want to go ahead and resolve those thinking patterns before they take root and sabotage your business.

In order to do that, let's explore the question of where thoughts like these might come from. Why would any person think something, believe something, or entertain an idea that was likely to limit their potential? The answer to that is fairly simple and straightforward – it comes from their past conditioning.

We've all grown up with people telling us what's right or wrong, good or bad, appropriate or inappropriate – the list goes on and on. We've absorbed these messages from our family circle, friends, community, culture, media, and social traditions.

In some cultures, for instance, salespeople are generally portrayed in a very negative light. They're thought to be people who are looking to take advantage of others, who will say or do anything to manipulate someone out of their hard-earned cash. If you have a stereotype like this hovering somewhere within the depths of your unconscious mind, it will naturally limit your ability to become an exceptional salesperson and close deals.

Another thing that can stop you from doing well at this is associating the memories of past events with present circumstances. For example, let's say that when you were much younger, you were treated harshly by other children in school. You may have been teased, picked on, or even bullied. Maybe people didn't take you seriously, or you tried out for some sort of academic position and no one voted for you.

Sometimes we hold on to unpleasant emotional memories like these and they affect us for many years into the future. While you know on an intellectual level that you're a competent adult who's learned how to socialize and integrate with other people, when it comes to putting your best foot forward and giving someone you don't know the opportunity to accept or reject you, that little child – the one who is still nursing old wounds – will show up.

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In a few moments, we're going to walk through a couple of exercises that are designed to help you resolve internal barriers like these. The first one will help you to process and release feelings that might stop you from utilizing the techniques in this course to their full potential.

For instance, you may feel anxious or fearful when you reach a certain part of the enrollment process. Maybe you start to get nervous, or experience a sense of tension that prevents you from communicating effectively. Sometimes, these things will go away by themselves over time and with practice.

In other cases, however, they are the product of something deeper than has been repressed and are trying to come forward. Whatever the reason, there's still something you can do to resolve these feelings – often very quickly – and, therefore, greatly improve your ability to make this system work.

The problem most of us have with resolving emotional blocks is that we try to fight the feelings that come up. We may try to ignore our internal experience or pretend that what we're feeling really isn't there. We might try to avoid the feeling, hoping it will go away, or we get lost in nonproductive busy work that distracts us from what we really need to do.

When you take a different approach – when you witness the feeling and stay inside of it without judging it or evaluating it in any way – you can appreciate the part of yourself that is trying to serve you by expressing that feeling. This can be challenging to do at first, but just stay with the technique and stay inside of the feeling in a spirit of acceptance and with a willingness to listen to whatever your unconscious wants to say.

With that being said, let's continue with this technique.

## Exercise - Emotional release

Think of whatever it is that you're doing when you feel the fear, tension, stress, anxiety, etc. Imagine yourself going into that moment right now so that (in your mind) you're with a client and going through the enrollment process.

Notice what you see, what you hear, the temperature of the air, the way you're breathing with time moving forward until you start to feel that unpleasant emotion.

Take a moment and locate exactly where you feel it inside your body. As you do that, think about how you would describe the physical sensations you feel. There may be a tingling in that area, a denseness, numbness, or lightness, coldness, warmth, or compression – you get the picture. As you think about that, see if you can bring your attention to the focal point of that feeling; wherever the sensation is strongest.

Allow yourself to become aware of the sensation; no judgments, no resistance, no evaluating or analyzing anything. Just feel and experience it. Let the sensation be there and become aware of it.

Allow yourself to assume a neutral state of mind, not arguing with the feeling, avoiding it, or pushing it away. You're neither agreeing nor disagreeing with it. You're simply saying that it's okay for whatever you're feeling to be there.

Eventually, you'll notice the feeling beginning to dissipate. Once you've allowed it to express itself and process in its own way, it will no longer need to exist in the same way.

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After probably just a few minutes, you'll notice how you can think about the same situation and feel much better than before. In fact, the sensation you were experiencing will no longer be there as it was. There's a good chance it will be gone completely, or it may have lessened or changed into a general awareness of some sort of message from the unconscious.

If the feeling has lessened but you'd like it to decrease even more, or if it's changed to another sensation you'd like to resolve, perform this exercise once a day (or every other day) until you're satisfied with the result.