



# Discovery Calls that **Convert**

***Leading powerful discovery calls is the cornerstone of being able to turn leads into paying clients.***

***And this is so important because even the most motivated, ready-to-go clients in the world, still need a good deal of validation and support to make the decision they already know they want to make.***

***By establishing your expert position, demonstrating how you can help, and helping your perfect clients-to-be to overcome the fear of making that major investment in themselves, you can finally become the kind of coach who supports huge transformation for her clients and creates incredible transformation for herself.***

***So let's dig in...***

## **Leading the Discovery Process**

The structure of a flawless discovery process looks like this:

1. Introduction
2. Explore current situation and desires/ambitions/goals
3. Explore what is stopping them from getting results themselves
4. Explore "Why now?"
5. Explore "Why you – as the coach?"
6. Explore commitment levels
7. Reflection and matching – this is the first time that you will give ANY feedback on what you've heard. Do not be tempted to indulge in coaching on a discovery call. The purpose of the call is to learn about your potential client, not give unsolicited coaching when you've not been hired to do so.
8. Set expectations for working together
9. Confirm what you'll work on together
10. Build anticipation
11. Answer questions
12. Get a firm commitment
13. Make an invitation
14. Objection handling – this is the first time that you will really indulge in any coaching, and at this point you are only coaching them to make a decision. Yes or no. The key to this point of the conversation is to get a firm response.



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## 1. Introduction – approx. 2 mins

Always establish yourself as the call leader, right from the outset. Always lead AND always ask permission.

Lead: ***“Hey [name], I’m really excited to speak with you.”***

Understand their position: ***“How are you doing today?”*** – excited, nervous, etc

Respond: ***“Ok, well there’s no need to be nervous, the call will be fun”, or, “Great, me too!”, etc***

Let them know that **you know** that **they know** this is a sales call ;)

Lead: ***“So, I understand you’re interested in working with me in my private coaching programme.”***

Ask permission: ***Is that right?”***

Ok, that’s the white elephant acknowledged. They know you’re going to sell to them!

Once you get confirmation...

Lead: ***“Great! So, the purpose of the call is to help me understand your ambitions/goals/desires a bit better and to explore what it would look like for us to work together.”***

Ask permission: ***Sound good?”***

Once you get confirmation...

Lead: ***“Great. Then let me give you a quick overview of the call and we can get started.”***

Ask permission: ***“Is that ok?”***

Once you get confirmation...

Lead: ***“Ok. So I’m going to be asking some questions to give me a clearer picture of where you’re at right now, where you want to be, so I can make sure my coaching is suited to your particular situation.”***

Ask permission: ***“Sound good so far?”***

Once you get confirmation...



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Lead: *“Then, if it looks like we are a good fit, we can explore what it would look like to work together and I can answer any questions you have”*

Ask permission: *“Is that ok?”*

Once you get confirmation...

Lead: *“Great, then let’s get started!”*

What language/phrases will you use to open/lead the call?

## 2. Explore current situation and desires/ambitions/goals – approx. 5-7 mins

Start by asking questions about where they are right now and where they want to be, then delve into their big WHY.

Also, always try and help your client to come up with tangible answers. You want things to be as concrete as possible, because just like clients don’t book calls with coaches who talk about woolly subjects, clients rarely get to that “YES” if they can’t see a tangible result from the outset.

If they start talking about intangibles, such as confidence, mindset, and so on, dig deeper and ask what that would look like to them, how they would be handling situations differently if they had that. Ask them to give specific examples. You want them to be crystal clear about how different things would look if they had that piece in place.

Suggested questions:



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- *Tell me about your current situation*
- *If I could wave a magic wand and make everything exactly as you'd like it, what would be different? What would be the same?*
- *What needs to be different for this to happen?*
- *What will it mean when you achieve this? (not if, but when)*
- *Why is it so important to you?*
- *Who else will benefit as a result of you achieving this?*
- *What will happen if you don't move forward on this?*

What questions will you use to explore current situation and desires/ambitions/goals?

### **3. Explore what is stopping them from getting results themselves** – approx. 5-7 mins

Next you want to find out WHY they've not been able to sort this out already. The key aspect of this line of questioning is to help your client see clearly what is holding them back, and to understand why they need your support, if they intend to progress quickly.

Again, don't be afraid to dig deeper if necessary. Ask them to elaborate, explain further, or give specific examples to make sure you have a clear picture of the issues at hand.

Suggested questions.

- What has stopped you from achieving your desires so far?
- What is it about XXXXX that you makes it so difficult to overcome?
- What ELSE is stopping you?
- Whose opinion/judgement are you worried about?
- What's your biggest fear around pursuing this goal?
- How will you achieve this if you don't get support?



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What questions will you use to explore what is stopping them from getting results themselves?

#### 4. Explore “Why now?” – approx. 3 mins

This is an important part of the process that most coaches completely omit, but it’s so important. Your objective here is to make sure your prospective client knows WHY they’re taking this step now.

Suggested questions:

- What made you decide to seek help now? Why not in 6 months? Or a year?
- What has stopped you from seeking help before?
- When do you want to achieve it by?

What questions will you use to explore why now?



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## 5. Explore “Why you – as the coach?” – approx. 1-2 mins

Ok, so now you need to help the client get clear on why they’ve chosen you. This helps you to understand if they’re a good fit, and helps cement in their mind why they want to work with you.

Suggested questions:

- What was it that made you decide to reach out to me specifically?
- What is it about my coaching that appeals to you?
- What makes us a great fit to work together

What questions will you use to explore why you?

## 6. Explore commitment levels – approx. 2-3 minutes

And finally, the most crucial question that virtually every coach neglects to ask... commitment.

Hint: If commitment is not 10 out of 10, you need to raise that commitment level before going further.

Suggested questions:

- How committed are you to making this happen?
- How committed are you on a scale of 1-10?
- What would need to be different for you to be a 10?
- What are you willing to change about yourself to make this happen?



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What questions will you use to explore commitment level?

## 7. Reflection and matching – approx. 5 mins

Ok, so now it's time to reflect back to the client what you've heard, and match their desires and needs to your coaching programme (provided it is a good fit for the client).

Lead: ***“Great. So [name], I think I have a good understanding of your situation and desired results now, so I'd like to take a couple of minutes to reflect back what I've heard, just to make sure I'm on the right track”***

Ask permission: ***“Is that ok?”***

Once you have confirmation...

Lead: ***“Ok, so I'm hearing that you...***

***Want... [reflect desire in the client's words]***

***Currently can't achieve that because you're missing***

***1... [reflect biggest limitation/obstacle in the client's words]***

***2... [reflect 2<sup>nd</sup> biggest limitation/obstacle in the client's words]***

***3... [reflect 3<sup>rd</sup> biggest limitation/obstacle in the client's words]***

***And you are committed, at level 10, to resolving this in the next X months.***

Ask permission: ***“Is that right?”***

Once you have confirmation...



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Lead: *“Great, so in that case, if you were to have...*

*1... [aspect of your coaching that addresses biggest limitation/obstacle in clients words]*

*2... [aspect of your coaching that addresses 2<sup>nd</sup> biggest limitation/obstacle in clients words]*

*3... [aspect of your coaching that addresses 3<sup>rd</sup> biggest limitation/obstacle in clients words]*

*do you believe you could achieve... [reflect desire in the client’s words]*

What language/phrases will you use in reflection and matching?

Once you have confirmation...

Ask permission: *“Wonderful. So, in that case, would you like to discuss how you would need to show up if we were to work together?”*

Once you have confirmation...

## 8. Set expectations for working together – approx. 3 mins

Outlining your expectations in advance of working with someone means that they come to your coaching programme prepared and ready to do the work, and outlining them during the discovery call is an awesome way to set the bar right from the outset.

It also makes it easier for you to identify a client who is a good fit, right from day 1.

My client expectation list looks like this...

- Appreciates me and values my coaching
- Is coachable and open-minded
- Has an inspiring mission/desire



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- Comes prepared to sessions
- Does the work
- Is open to honest feedback
- Is optimistic and self-motivated
- Takes full personal responsibility for their current position, decisions and growth
- Has a basic understanding of wealth consciousness and spiritual awareness
- Is resourceful enough to find the money to work with me
- Pays their bills on time

Create your client expectation list...

So, thanks to this checklist, I can lay out my expectations for the client.

I would typically use very assumptive language (when not if) and say something like...

**Lead: "So, when we work together, I'm very direct and to the point. If I see you hiding or sabotaging I am going to call you out on it, and I need to know you are going to be open to that. That doesn't mean you have to like what I say, or even like me sometimes, but you need to understand that my priority is to make sure you see clearly the decisions you're making, the actions you're taking, and the consequences of both. Also, we don't have to agree on everything, and while I'll share my strategies with you, it is for you to decide which path to follow, and to take responsibility for your decisions. While I'm behind you 100%, you're the one who has to go away and do the work, and so you need to show up ready to be that person, turn up prepared to sessions, and do the work you agree to take action on."**



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How will you outline your expectations to your prospective client?

Ask permission: ***“So, how does that sound?”***

If this is a perfect client, your expectations will excite them, and you should be getting a very positive response at this point.

N.B. Most people have never been held accountable to succeed personally in their adult lives. So, you setting clear expectations, and letting them know that you’re gonna be putting a rocket under their arse to achieve their dreams, is a big turn on for a perfect client.

Once you get confirmation...

Ask permission: ***“Great! So would you like to have a chat about what it would look like for us to work together?”***

Once you get confirmation...

## **9. Confirm what you’ll work on together** – approx. 3-4 mins

Now it’s time to bring out the big guns and prove how awesome your coaching is for this client (presuming it is).

Bearing in mind the three points you drew out at step 7 (reflecting and matching), you’re going to lead with these – which since they’re the client’s biggest issues.

And use really assumptive language.



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Try something like...

*“Ok, so when we get started we are going to dive straight into [biggest limitation in client’s own words] by [aspect of your coaching programme that deals with this issue] so that [huge benefit of that action].*

*Next, we’re going to look at [2<sup>nd</sup> biggest limitation in client’s own words] by [aspect of your coaching programme that deals with this issue] so that [huge benefit of that action].*

*Then we’ll be dealing with [3<sup>rd</sup> biggest limitation in client’s own words] by [aspect of your coaching programme that deals with this issue] so that [huge benefit of that action].*

*And, we’ll also be working on [touch on a couple of less notable but important areas that may have come up or that you know your client will need] so that [huge benefits of those actions].*

*We’ll get together every week/fortnight/whatever for the next X weeks/months, and you’ll have [any additional access] to make sure that you have all the support you need to take action, master these steps/skills and create [client’s desire in their own words].”*

Ask permission: **“So what do you think?”**

At this point, your client-to-be should be frothing at the mouth with anticipation. Expect to hear “I love it!”, “It sounds amazing”, “How fantastic”, or something similar.

## **10. Build anticipation** – approx. 2-3 mins

Whatever the response you are going to turn it right back on them and build anticipation.

If they say it’s great, then you ask **“What’s great about it?”**, if they say they love it, ask **“What do you love about it?”** and so on.

Then just let them talk themselves into working with you. Give reassurance, agree with their enthusiasm, you can even add an “Oh yeah, I love that too” if it’s appropriate.

## **11. Answer questions** – approx. 3-10 mins (depending upon how much comes up)

Now, throw in a little doubt, to prove that you’re not afraid of dealing with issues. The last thing you want is for buyer’s remorse to come up after they leave the call, so get it out on the table now.

Ask...

- On a scale of 1-10 how committed are you to getting this support?
- What would need to be different to make it a 10?
- What would you need to get from our time together to make it a no-brainer?
- What concerns do you have?



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If concerns come up around money, advise that you'll address the money concern in just a minute but first you want to ***"make sure it's a good fit for both of you, because the money is a moot point if it's not the right fit"***.

Get all concerns off the table BEFORE you introduce the money. Answer all questions and get the client to a commitment **level 10** before inviting them to work with you.

## **12. Get a firm commitment** – approx. 30 seconds

Lead: ***"So, all things considered, do you want to work with me in my private coaching programme?"***

Once you get confirmation...

## **13. Make the Invitation** – approx. 30 seconds

Lead: ***"The programme I'd recommend for you is my [X month programme name] and the investment is [price]."***

Add fast action bonus (optional but recommended): ***"And, if you sign up today, you'll qualify for my fast action bonus which is a [e.g. 2-hour intensive to work on your] [biggest limitation in clients own words] so we can jump start your coaching and [huge benefit of that coaching ideally in clients own words]."***

**Assume:** ***"So, when would you like to get started?"***

Hold your nerve. Be quiet. Give them the space to think, process, and decide.

### **DO NOT SPEAK UNTIL THE CLIENT DOES**

At which point they will either say – RIGHT AWAY – and you can discuss next steps – logistics of making payment, booking in calls, and so on...

Or they'll object...

## **14. Objection handling** – approx. 10-15 mins (depending on the complexity of the objections)

Objections usually fall into 1 of 3 categories...

- 1. I need to think about it**
- 2. I need to speak to [spouse/partner/financier/accountant/etc]**
- 3. It's very expensive**



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Or some variation of those three.

So, how do you avoid losing a sale when you hear these objections? First off, always agree with your client-to-be's perspective (you'll never make a sale on a disagreement so don't create one) and then help them to consider an alternative point of view. And always have plenty of ways to overcome the objection, so that you don't get stumped before the negotiation even gets going...

Here are my top tips to overcome these most common objections and close that sale, so that you can make a huge difference for the clients who want to work with you!

## 1. I need to think about it...

- a. You should definitely think about it, but be aware that, no matter how long you spend thinking about it, this will still be the coaching programme you need to get [results they said they wanted]. So how about we drop the fear of making a decision, which is probably going to tie you up in knots, and get this agreed and your first session booked into the diary so you can start making progress toward [thing they said they wanted]?

***Here you're reflecting back the fact that they're sabotaging their own progress by procrastinating.***

- b. Of course you need to think about it. The truth is that whether you make the decision now, or tomorrow, or next week, or next month, the three questions will still be the same. May I share them with you? 1. Can this programme get you the results you want? 2. Can you come up with the investment? 3. Am I the coach you want to be guiding you and holding you accountable? – Where the answer to all 3 is yes... Great, how would you like to make payment?

***Here you're focusing the client on the key concerns so that they can move quickly to certainty, whether that be a yes or a no.***

- c. You should definitely think about it. Tell me, what do you need to get from this programme to be able to say yes today?

***Here you're asking the client to tell you what the problem is and/or what they want so you can seek a way to close the deal on the call.***

- d. May I be direct? Thought is instant. What you're talking about is going away and over-thinking yourself into indecision. Let's think this through together now, and then you can make a decision. Yes or no, it really doesn't matter, but over-analysis is never a good way forward.

***Here you're helping the client to see the absurdity of going away and thinking rather than acting. How many times have they overthought themselves out of a great opportunity in the past? Lots probably.***

- e. Of course you do. And I'm a little confused because you said you were 10 out of 10 committed to getting this support. So, what aspect is it that you need to think about?



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*Here you're highlighting the fact that they're making excuses. Ask with compassion, but be direct and then deal with the issue – which is most likely going to fall into the other two categories.*

- f. Absolutely. It makes sense to think about it. I know this programme better than anyone so if you have questions, or concerns, I'm the best person to answer them. *Here you're reassuring them that you understand and you're open to helping them address their concerns which are most likely going to fall into the other two categories.*

If you can't gain agreement at this point, then the "need to think about it" will usually turn into one of the other two objection categories...

## 2. I need to speak to [spouse/partner/financier/accountant/etc]

- a. Of course, you should speak to your spouse/etc. And what do you think that they're going to say?  
*Here you're providing an opportunity to think through the way that conversation is likely to go and prepare for it. Often, at this stage, they'll say that their partner will agree to them taking action, and then you can simply ask them to complete the sale now and book in the first call. If they believe that the spouse will have an objection go with...*
- b. And how will you respond to that objection?  
*Here you're coaching them through handling that conversation so they are still able to take the action they want to take. If necessary, send them off to handle that conversation and book a follow up call within 24 hours.*
- c. What if he/she says no?  
*Here you're helping the client, who's already told you they're 10 out of 10 committed to working with you, to explore what's going to happen if the other party disagrees. This is a great opportunity to close with something cheeky like... "sometimes, it's better to beg forgiveness than ask for permission"*

## 3. It's very expensive

- a. It is expensive, but you probably knew that before you got on the call. Shall we get your sessions booked in now?  
*Here you're acknowledging the complaint, but not treating it as an objection – because it may not even be an objection (how many times have you bought something even though it was very expensive)*



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- b. It is expensive. In fact, everyone who invests in this programme agrees that it's a significant expense but that the return on investment makes it well worth it. And that's why it's important to get started right away. So, when shall we book your first session. I have time this Thursday.

***Here you're agreeing that it's expensive, but still not addressing it as an actual objection, more so helping the client to see that it's certainly a big investment, but also a worthwhile one.***

- c. It is expensive. Expensive in comparison to what?

***Here you're highlighting the unjustifiability of the statement and, depending on their response, you'll be able to quickly overcome this objection and go for the close.***

- d. It is expensive. In fact 90% of the clients I work with go over budget when it comes to coaching. In fact, since you're already over budget, have you thought about going all out and getting the premium service.

***Here you're actually testing the waters to find out if the cost really is a problem. Lot's of people will say that something is more than they were expecting, and will then upgrade and pay even more, to get a better service. This is a great test of the money 'objection' that can lead to a bigger sale or, at the very least, clarity over how big a problem the money is. Do you have a super-premium option you can trot out on this occasion?***

**If the client hits you with "I can't afford it"...**

- e. Ok. Are you open to having a conversation about the money piece?

***Here you're asking permission to open up a discussion about the money. A committed client will ALWAYS say 'Yes' at this point.***

- f. When you say you can't afford it/don't have the money, does that mean that you don't have the ready cash available, that you don't have savings which will cover it, that you don't have a credit card you could put it on, or that you don't have money for rent and food?

***Here you're helping the client to get clear about their financial position.***

- g. Are you open to brainstorming some ways that you can come up with the money?

***Here you're asking permission to get creative in generating financial options. A committed client will ALWAYS say 'Yes' at this point.***

[Click here to watch my short video on helping your client come up with the money](#)



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What other ways can you think of to handle these common objections, or others that have come up on your discovery calls?

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*Jo Davidson*