

Discovery Session Phone Script



Action Guide

The Discovery Session Phone Script for Selling Higher Ticket Coaching or Consulting Products and Programs

Welcome! In this Action Guide, we are going to focus on an enrollment conversation phone script that works very well. On this worksheet, you'll learn how to run a successful discovery or strategy session on the phone or in person.

Let's get started with a few essentials...

The discovery session appointment or enrollment conversation should be one of your most prized tools in your tool belt. It's designed in a very specific way and has a very essential order of operations.

The purpose of this process is to create two main things:

1. An opportunity to see if the client is someone that you can help and would like to work with.
2. An opportunity for the potential Client to take the necessary steps to change their situation.

This process begins with your potential Client filling out an application to speak with you and setting a time. This is a filtering process because your time is valuable and we only take calls with qualified potential Clients. This enrollment process can also be done in person or without an application filtering process.

After a potential and qualified client has applied to speak with you, modeling this conversation below will help you determine if they are a good fit for your coaching or consulting programs.

Please use discretion how you use this script and the individual influencing tactics taught so that you're in ethical and moral alignment to the values you choose to hold. Influence can be dangerous if used for the wrong reasons or if used to force someone into something that they are not ready for.

With that said, let's rock and hang in there if things get challenging.



As a beginning note, open all calls by creating the right space and setting the proper expectations. This script below is a sample and you should personalize it to you, your situation and your Clients. It is recommended that you practice this script twice a day... everyday for a few weeks.

We have also included some powerful rebuttals at the end of this script for you to practice and have memorized. The notes for you in this script will be in **Blue**. Things you'll say with emphasis will be **IN ALL CAPS or Bold**.

There will be _____ lines for notes that you can fill in as they progress throughout your call. If I put (around something) that means that you'll substitute your niche or area) when you customize your script.

Lastly, after you customize your script for your situation, it's recommended to print a fresh script for each call you have.

Let's begin studying this enrollment script...

Open the call with the right Context and do a VCPR if possible!

Hey ____ (Their first name) _____, I'm excited to be on the call with you so we can dig into your business together. (Hopefully that sounds good to you?)

So to start... I like to run a REAL RELAXED call...

I like to ask that there's no pressure or expectations from either side... sound good?

Ok, great.

We're both **gathering some information to see if** there's a fit between us...

And to see if... WE CAN **KNOCK SOMETHING** out of the park together...

Outline the call

Ok, so...

What I like to do is cover:

1. where you're currently at...
2. where you want to go... and
3. what's stopping you from getting there...

And At the end, we'll have a better idea of what some next best steps will be...

Either to have us create a custom action plan for you so you can hit the ground running...

or... to point you in the direction of another resource that's a better fit for you right now.

Find out why you're talking together

So... tell me a little bit about why we're talking today?

Ok, great. Can you tell me what's unavoidably at stake for you in your life?

Basically, it's why are we REALLY talking...

Ok great. So, let's talk about what's working for you in your (business), **and what's not working** that... you'd like some help with today... ?

Ok, and can you give me a picture of what a home run would look like for you over the next year...?

Build rapport with a similar personal story or similar Testimonial story - Have a hand full of these ready, based on what they're struggling with.

(Story 1) Unclear on direction and niche to serve - You know... I was exactly where you're at when I was 29... just about 6 years ago when I my business partner left the relationship, we were doing very well and now, I was faced with the daunting choice of... now what, what niche of people am I called to serve this year, etc... Luckily, I got help and worked through that fast... but boy was it uncomfortable, etc...

(Story 2) Needs Leads and Traffic help - You know... I was exactly where you're at when I was 32... just about 4 years ago when I was struggling to get qualified leads and traffic in the door and then I was also struggling to close the ones that I somehow managed to get in front of me. I was working myself to death and I never felt satisfied even when I was doing well... **and even worse my numbers didn't reflect where I**

really wanted to be. I learned some massive lessons since then and simplified the whole thing.

Back up with relevant Testimonial example. (If you don't have one, use your personal success on that topic as a credibility spike.

Since then, we've been able to help people _____(____)____ and____(____)_____.

Give Value and answer their main question quickly (Know them from the [application questionnaire](#) before going into the call.)

The biggest thing you can do to change this, weather we work together or not, is

- 1.) Find a way to streamline your lead generation system (Create your machine, etc.),
- 2.) Find a way to Systematize your sales conversion processes, (Sales Funnels, etc.)
- 3.) Find a way to Outsource your biggest "Sticks in the mud" (Delegation strategy, etc.)

Clarify one of them that most applies to their main solution

*** A stick in the mud is anything that you don't want to be doing. It's any business related task that makes you feel like you're stuck in mollasis and actually becomes a detriment to your business.

It's normally the thing that would cause you to lose money if you were to do it in your business. For me, it's social media and customer support.

You know what I mean? Do you have any of those? (Lol)

As Entrepreneurs, we try and do it all ~ **even worse, we try and do it all on our own.**

So, those last HUGE TIPS will massively help you (increase your income because you'll be solving the **three biggest challenges that haunt all Entrepreneurs.**)

First fork in the road to customize to their place in their (business) - For example, if they already have clients

Plus another challenging thing that most people struggle with...

is (increasing your prices and fees on your next few clients... because you're likely undercharging right now...)

And even more... because you're worth it... or else we wouldn't be on the phone today.

This is one of the fastest shortcuts we do with all our Mastermind Elite members...

What it does is... It undercuts a huge limiting belief that most people have in sales...

They think they have to undercut their value while working more hours...

They also don't get to work with the enthusiastic and rewarding clients that they deserve...

This one secret will give you the cushion of cash you've been looking for...

And... It'll help you leverage your time so you can _____(Things you said earlier)

How's that sound? OR Is that a useful tip for you...?

Begin the Pre-Summary Setup - In a dramatic way, review what they've mentioned as being MOST important and then take them to their pit or low point where their pain is at. Your job is to help them get in touch with the pain of staying in the same place.

Right... so... from what you've told me so far on the call... It sounds like (___you could use some clarity and an action plan for defining your niche and creating your coaching company.___) And with that you want (___to offer your clients both automated online products and a 1-on-1 coaching program.___)

And that can happen with a few diferent options that I may have for you.

Shift the mood and tone of the call to somber- (Unfortunately, it needs done.)

Ok, Great... So, in regards to what you shared with me as your biggest problem that's keeping you from (__add their thing__) (truly living your dream life with your dream business...)

And thats keeping you from having the money you need to feel financially secure inside...

IS THAT RIGHT...?

How long are you willing to stay in this place without my help...?

(Wait for their answer, then proceed)

Begin the Pre-Offer Setup

You may have come to this call for one of two reasons...

If you came to this call just to gather information, then hopefully everything I've shared with you so far will help you,

but....

If you came to this call **looking to transform** (___your business and your life...___)

then I'd love to help... In fact, I'm actually called to help you, so...

Can I help you?

Wait for their YES answer!

Is it ok with you if... I shared a little bit about what I have going on right now with a few diferent things...?

Wait for their YES answer!

Ok great, **so like I was saying... this may be for you** and it may not be for you.
However...

Only say line below if you do have their solution in your program, class or service
I'm convinced that I DO HAVE THE SOLUTION to your biggest problem...!!!

...If you'd like to hear about the details,... I'd be glad to share some of them with you real quick...

Sound good?

If they say yes, move forward...

If they hesitate, say...

and if you're not interested in hearing about it... I'm cool with that too!

If they say no, build rapport **if you are interested in working with them** and inquire more about their underlying motive for setting up a call and figure out what they really wanted. This is a good point to ask them about the details of their application that they previously filled out. Find out where the inconsistency is.

Set up your value stack and FULL PRICE non-fast action scholarship "Sticker Shock"

Please tailor this section below depending on who you are talking with and what they need, based on their application. (KNOW YOUR AVAILABLE PROGRAMS (2) before getting on the call with them.)

Ok, Well Like I was saying, this may be for you and it may be not... but,
I've got this little program that I've put together where I'm inviting just a few people to share some information and some of my (___sales systems and lead generation strategies___) with them...

It would specifically help you get the result of ____ (refer to your earlier questions and answers of what they want)

_____. as quickly as possible... with little to no overwhelm or confusion (refer to their biggest fear or blockage issue)

Basically, everything in the program is designed to help you (best serve your desired niche of people and build a highly profitable coaching business.)

We'll be focusing on generating (highly targeted and qualified leads that convert into enthusiastic clients.) [Stack your highlights and value](#)

And... it also helps you build (a referral network to stabilize your lead generation system and your sales pipeline as you progress). [Stack your highlights and value](#)

This program will help you (leverage your time by automating the parts of your business that should be outsourced to either another person or a program.) [Stack your highlights and value](#)

Ok Great so far... YOU STILL WITH ME?

Essentially... this is the blueprint to __ (running a highly profitable lifestyle based coaching company thats automated on the front end and high ticket in the backend)

This would greatly help you with you specifically solve your problem of:

Now, I can't promise what you'll do with this information and how far you'll take it...

because it's entirely up to you... and how simple (and profitable you can make this process for your business...)

And... how well you can follow what we suggest you could do...

The Value Stack summary and buy in - Customize inside the (parentheses) for your situation.

Would you agree that **IF YOU HAD (___AN AUTOMATED SALES SYSTEM___)** that **(___generated leads for you...___)** you could **(serve those clients to the best of your ability?)**

See, I bet you could (_____ double your leads this year and start to convert a higher percentage of your sales _____.)

I bet you could.

I say to (convert leads “more often” because I encourage everyone to set up a business model that does multiple transactions with the same customers. I encourage treating clients and customers as well as you can.)

FUTURE PACE! Give a success example so they can try it on and see what’s possible. Only do this if you believe it and if it’s practical to their situation. This can apply to weightloss or any other Coaching, Consulting or service.

If... your average commission is \$10,000 and **you had 10 new highly qualified client leads per month...** and you closed just 30% of them on average... that would net you an additional \$30,000 per month!

We’ll definitely go through some more of the math to help you arrive at the numbers you’d like...

but... what I’m saying is that YOU CAN take this program and business model as far as you’d like.

Is this program something you’d like to put into place right now?

If they say yes, move forward...

If they say no, you could do one of three things.

1. Ask them why and overcome objection or resistance.
2. Tell them you understand and give them a PDF handout or parting gift.
3. Tell them thank you and refer to someone else that may have what they need.

Go into the Pitch details

Ok, great, I'll tell you a bit more of the details then...

It's on the phone and it starts next week... it's a couple of calls per week.

We do trainings on (Tuesdays and Fridays)... and we also do live Q & A sessions towards the end of the week...

We're going to be solving the problems associated with (___ setting up reliable Lead Generation systems and Sales Conversions Processes so your ROI's on advertising take off. ___ So you can get back up to \$10 for every \$1 you spend in ads oppose to even money or a loss ___)

we also solve the problems associated with getting steady referrals from past clients and associates.

Plus... how to leverage your time and resources so you can design the life you want.

So, I'd love to get you on board... How the pricing works out is pretty cool.

"Given what we've covered here, I think my Private Mastermind Elite is the best fit for you,

but it isn't cheap..,

and requires a big commitment for you to **step up** and truly **go Pro** in your business.

It's usually too big of an investment, both time and money, for most people who think they're ready to jump to the next level...

But those that do make the commitment..... **kill it every time...**

So..., I'll just put it on the table that it's an \$14,000 investment.

We've found that people who take action quickly become the best clients because...

they tend to take action on the advice and the feedback we give them in the class...

And... **we find that they're really just more fun to work with.**

So, If that's you... then I'm willing to invest a \$4,000 scholarship in you to have you come on board.

Provided...

it's something **that's a fit for you on this call! (Must be a fast action taker)**

If it's not, you can reach back out to the office at any time and enroll at the \$14,000 mark...

[If no objection...]

So what I'd like to do with you specifically (____ *THEIR NAME*____) is to go ahead and make sure that we've got your shipping address correct _____ (Or Ask *what their shipping address is* _____.)

Is that the address of the credit card?

What card are we going to process this on...?

FINISH CLOSING Unless we get an objection (See below for rebuttles) **NOTE: Process the card right there on the spot, over the phone...**

Objections to study and comit to memory...

Price is too high / doesn't have the money?

I totally understand if you can't make an investment in yourself but let me tell you what we tell everyone here in the office:

100% of the people who take action ***move forward***.

If you keep your money, you keep your problems.

[If push back... ask. Is it the cash flow or is it your decision on how valuable this is to you?

If it's the cash flow we can take in 2 payments of \$5,000

[If they offer anything else]

Say...

Well, I do ask that you reach out to the office when you're ready.

Obviously, you know that you'll lose a couple of things...

You'll lose the scholarship of \$4,000 and you'll lose the progress that comes with this offer...

and you'll lose that opportunity to know that when you came to the offer... you took it... straight away...

But You Know...

You can reach out to our office anytime you are ready to begin to design the life you have always dreamed about...

OR...

You can take the commitment today and invest in your future Right Now!!!...

(As the baseball great Yogi Berra said,... that when you come to a fork in the road...
(TAKE IT)

So that's our pitch... and we don't tell everyone they're a fit...

But... I definitely see how easy it's going to be to get you to the next level... plus, you're a great fit for our Mastermind Elite Team...

Or make your offer to a lower priced evergreen program that you already have.
Or make a referral to another colleague of yours that's a better fit for them

Can I get back to you on this offer?

"Absolutely... You can reach out to my assistant. We normally don't let people into classes more than three weeks after they start, but you may be able to get into another class at another time.

As you're aware this scholarship **is good for this call only**,
My commitment is to help you take advantage of this offer... on this call.

You know, we can set up a 4 payment system for you right now if that would help...
Would you like to secure your scholarship with this option? At \$2,500 each month?

If yes, proceed to take shipping address and card number

If no, ask them what they propose and finalize their interest in taking action... (Reason Why?)

If not enough money, tell them, my integrity is most important to myself and my clients. (Yes, I understand you would like to pay less. I'd love to have you on board. Could you tell me how much of an investment into yourself your possibly able to make today? I ask that because we have a powerful program called the Client Attraction Blueprint Web Series and I believe that you would be able to accomplish 99% of what you're looking for. How's that sound?

Plus I'll give you 50% off of it today when you sign up on this call. I can take a payment of \$1,000 today and another \$1,000 in 30 days, totaling only \$2,000 to join that program.

Can I make a decision later?

Well, this offer is good till the end of the call. You can come on board anytime you'd like. All you have to do is get in touch with my assistant and get you enrolled anytime.

You do realize that the investment at a later date will be \$14,000) [*As their future coach...* **Stick up for them**] I'd like to help you get your hands on this scholarship.

Can I pay you as I get results?

Well, That's wonderful (____THEIR NAME____) and I will share with you that our program is specifically designed to be "Not attractive" to people that were looking for that feature.

I've found that clients looking for that don't bring the necessary "umph and followthrough" that's needed to make it to the next level. But it is a very interesting observation tho.

Do you have any case studies you can show me?

Yes, but I'm not going to send them to you. The reason why is because we've found that when we release the names of our clients people constantly bug our clients with questions about the program but never buy. We also hold our clients information as PRIVATE... much like we would hold all your info PRIVATE too. Our past and current clients love that about us.

Can I think about it or ask my husband, partner or wife?

As long as this is available, I'd like to make it open for you.

You can take as long as you like to decide. And you can just call back in and if we do have it available, just reach back out and we'll definitely get you started whenever you decide that it's a good fit.

Go ahead and look me up, visit my social media pages, there is plenty of proof that I get great results for my clients. If that's not enough nothing will ever be."

If Someone gets angry...

Can I ask you a question, Would you like the opportunity to select your mentors and choose at what price or would you want them to dictate to you the price. Which is the scenario you're most comfortable with? (Great, I totally understand that. As someone looking for sponsorees, I'd like to ask of the same for me and be able to choose who I work with)

Any other type of no or brush off

Okay, I get it. You don't have any money. I understand. Can I sign you up for the Client Attraction Blueprint Web Series? I'll give you 50% off that today, just while we're on this call. That program is normally \$4,000, but we'll make an executive decision to cut that in half for you right now. You can get involved in that right now for only \$2,000

If resistance,
offer 2 payment option of \$1,000 today
and another \$1,000 in 30 days

Can we put that program in place for you today?

END OF SCRIPT

I hope you've enjoyed this script and can find a way to customize it and implement it into your business. **Memorize it!** Now, for best results, you can study and practice it twice a day... everyday! Record yourself and do mock phone calls. Listen to your recorded calls and take notes. Modify this script and keep practicing.



For homework... Record yourself doing a mock session with someone or if no one is available, improvise and play both parts.

When you're done with this, email the MP3 to corey@coreyteramana.com To record this on the phone you can create a free account at www.freeconferencecallhd.com

If you enjoyed this and are interested in developing next level leadership qualities to support your life, your business and your relationships, come try out our Inner Circle Leadership Mastermind team. Over the years, both men and women alike have been coming together to play a bigger game that directly impacts their success with everything in life, including their finances and their overall effectiveness in relationships. [Click here to check it out!](#)

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And if you'd like to speak with me personally about your unique situation, you can set up a FREE strategy session where I can bring you my highest level of consultation support! [Click this link here to get on my calendar.](#)

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Limited Time Slots - Check Our Calendar For Availability

Click Here To Schedule Your Business Consultation Now

Looking for a powerful sales funnel (website) solution designed to help you generate leads, convert sales and increase your overall business success?

Great, I've built you a few and I'm giving you all three of my proven drag and drop funnels that I've used to make money with and simplify my business life! They even come with a free 14 day trial so you can see if you like the software called ClickFunnels. Hands down, it's the best I've ever come across!

To download any or all of these prebuilt funnels, all you have to do is click the images or copy and paste their individual links into your browser. The best news is that the download will start automatically!

Here is the first funnel... [click this link](https://app.clickfunnels.com/funnels/6099983/share/rtu6p47o2v8akqk9) to start automatic download and free account setup: <https://app.clickfunnels.com/funnels/6099983/share/rtu6p47o2v8akqk9>



Here is the second funnel... [click this link](https://app.clickfunnels.com/funnels/6832062/share/b4ap1yygadqbg8m) to start automatic download and free account setup: <https://app.clickfunnels.com/funnels/6832062/share/b4ap1yygadqbg8m>



Here is the third funnel... [click this link](https://app.clickfunnels.com/funnels/6982386/share/v136tz3kvvx43vq) to start automatic download and free account setup: <https://app.clickfunnels.com/funnels/6982386/share/v136tz3kvvx43vq>

