Mentoring Program
Successful Business Building Steps

Course 10 Module 4 Lesson 5

Creating Your First Webpage
Work with Me Part 2: Steps to Scheduling Sessions

Now that you have named your initial consultation and decided on the length of time and what, if anything, you will charge; it's time to think through the ways that a prospect will get to your "Work with Me" page to schedule that initial consultation.

There are basically four ways someone will schedule a session with you via your webpage.

In the beginning most of your initial sessions will be set up during a face-to-face conversation!

1. **You are speaking to someone face-to-face and together you decide they are ready to schedule with you.** In that case I would:

    A) Immediately **look at your calendars** and **schedule the date and time for the session**.

    B) Then, while *you're still talking* and in the flow invite them to pay right now.
    - Use a **credit card swipe** system like *PayPal* Triangle or Square. (Your Credit Card or *PayPal* company can help with this.)
    - **Or you can Text them your payment link** which will be a *PayPal* private page as mentioned previously.

    Yes, ideally you save everyone distress when you have *them submit payment while you're there together*.

    This does three things.
    - It **locks in their session**.
    - It gives you the opportunity to **make sure the systems are working.**
    - And most important (especially if the session is scheduled soon), this **gets all the minutia out of the way** so that when you get to the session you can totally focus on doing the wonderful healing work.

    C) Once you see the **payment go through, celebrate and congratulation** them. Get them **excited and looking forward** to the session and then **tell them exactly what will happen next.**

D) Tell them the next step is to have them complete your **Client Intake Form**. You can either tell them the webpage address and get them to go to the "Work with Me" page or you can always text or email that to them (make sure you have the correct email address) ASAP.

E) Tell them they will see a "Thank You" page showing that the form was submitted. And then you will send them a **reminder email 24 hours prior** to the session **with the Zoom or phone links**.

Remember that you're nurturing them throughout the process. It is new and can be scary for them. The thing to always focus on is that you're going to help them get past some kind of pain. You do NOT want to give their EGO time or space to talk them out of it.

Remember F.O.R.M. *(from Course 2)*. Go review that course and make some mental notes on how you would love these conversations to go. The F.O.R.M. template will help you know how to create rapport, see if they are a good fit for your work and then you can ethically and easily help them decide if they are ready to stop suffering and settling by getting them scheduled and paid for a session.

2. **The person heard you speak**, attended your class etc. Please keep in mind that **every time you speak** in public you need to do two things:

   #1. **Give out your website address at least twice.**

   #2. At the end of your presentation **always invite the listeners to work** with you. *"You can schedule your 60-Minute Breakthrough Session for Clearing Cravings in three easy steps …"*

   Click on the **"Work with Me"** tab, **complete your Client Intake Form,** and **I will call you within 24 hours!**

3. *Obviously, if the person heard you speak and you get to meet the person afterwards, you will simply follow the scheduling flow path outlined in #1 above.*

4. The final way that a person will use your website to schedule sessions with you **is when you or a friend have directed them directly to your website. This is the person that you will not meet or speak to UNTIL your initial consultation.**

The instructions should clearly explain that they can start the process with ONE step:

A) **Complete your Client Intake Form** for you to review. **You will call them within 24 hours to discuss working together.**

B) **On that call (name it?)** you can decide together **how you can serve them** best (of course, you can) and you will **discuss the number of sessions** you recommend.

So as you can see, the information on your "**Work with Me"** page needs to be very clear about the steps the client needs to take. The only variable is the order of their steps based on whether they are speaking with you in person prior to completing the intake form.

Don't let them down by not following up. Call them in 24 hours!

Assignment 1: Write It Out

On the Word Document you started for your "Work with Me" page:

Write the out the instructions – the step-by-step process – your new client needs to take in order to schedule a session with you.

Once you have that written out, read it out loud a few times.

Is it crystal clear?
Does it show how EASY it is?
Can you imagine yourself speaking these steps in a public presentation?
When you read or speak the NAME of your initial consultation does it inspire YOU?

Assignment 2: Review Your Client Intake Form.

Make any updates needed*.*

Your Client Intake Form will be a part of your "Work with Me" page. using the **Formidable Forms** plugin.