How to run discovery calls that convert

with Vicky Shilling
the wellness business mentor

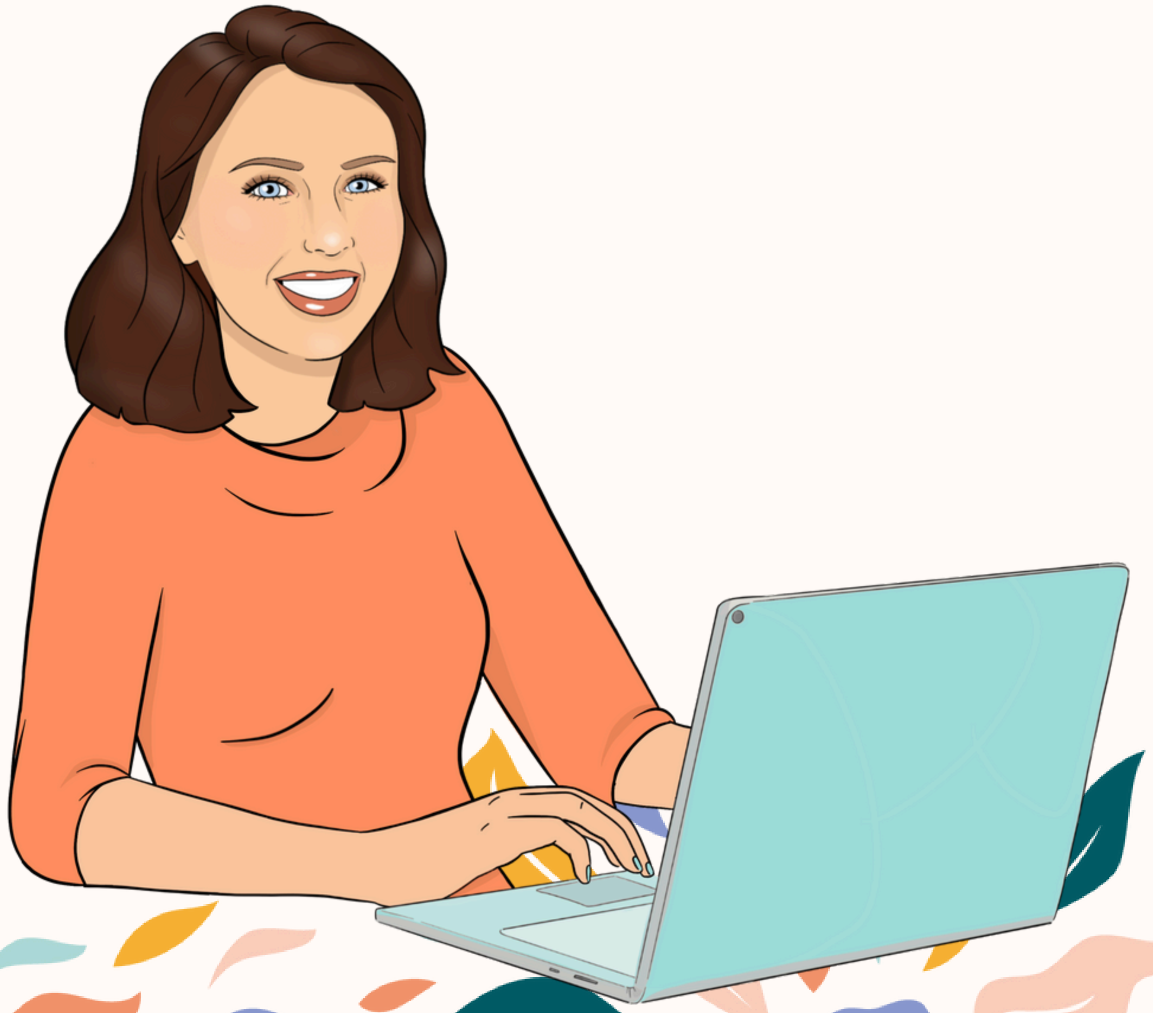
IINH Nutrition & Health

Hello I'm Vicky!

...the Wellness Business Mentor, helping health practitioners turn their expertise into income. I am dedicated to making well-being solopreneurship as simple and supported as possible in a world of advice overwhelm.

I share tips and straight-talking action steps through my Just Start Now book and award-nominated podcast, community and 1:1 mentoring.

Connect with me!



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What I'm about to share with you is part of my 5 pillar process to building a successful wellness business:

Clarity

Clarity on your vision for yourself and your business

Clarity on who you serve and how

Packages

Packaging your expertise into irresistible offers

Pricing that makes you a sustainable income

Selling

Sell in a way that feels fun, not 'icky

Master the art of discovery calls and sales conversations

Your sites

Build a website that attracts dream customers

Grow a mailing list that gives you a direct line to make sales

Connection

Reach the people that need you the most

Build a community with people who want to support and buy from you

What I'm about to share with you is part of my 5 pillar process to building a successful wellness business:

Clarity	Packages	Selling	Your sites	Connection
Clarity on your vision for yourself and your business	*Packaging your expertise into irresistible offers*	*Sell in a way that feels fun, not 'icky*	*Build a website that attracts dream customers*	*Reach the people that need you the most*
Clarity on who you serve and how	*Pricing that makes you a sustainable income*	*Master the art of discovery calls and sales conversations*	*Grow a mailing list that gives you a direct line to make sales*	*Build a community with people who want to support and buy from you*

How to run discovery calls that convert

1. Mistakes you're making with discovery calls right now
2. Attract the right people
3. Calendar and reminder set-up
4. Call structure
5. Dealing with objections
6. Following up

Mistakes you're making with discovery calls right now

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You're just offering a 'chat'

You're giving away too much on the call

You're not trying to get the sale

Mistakes you're making with discovery calls right now

You're just offering a 'chat'

- Chatting about their problem is what your ideal client can do with their friends and family. *They are coming to you for a solution.*
- Your ideal client *wants help*. Just chatting around the issue and not making them an offer is *not going to help them.*
- These albeit fun and enjoyable chats, never turn into any income for you which will leave you feeling resentful and like you're wasting your time.

Mistakes you're making with discovery calls right now

You're giving away too much on the call

- You're desperate to help and when the caller tells you their problems you have 100 ideas for what they could try to solve it.
- You can overwhelm them with all your ideas, which leaves them paralysed and scared of what working with you would feel like.
- They won't value what you are suggesting because they haven't invested, which means they won't take action or get results.
- They feel they've got plenty to go away and try, without needing to invest so buying from you now feels pointless.

Mistakes you're making with discovery calls right now

You're not trying to get the sale

- You are afraid to actually *sell* on the call.
- You're just letting the caller go with a "get back in touch if you're interested" type sign-off.
- If you aren't comfortable about selling then that will reflect back in the prospect's awkwardness and discomfort too
- Because you don't ask for the sale, you'll start to believe that people don't want to invest in themselves. This isn't true. They agreed to the call for a reason.

Attract the right people

Attract the right people

Stating the obvious:

Getting the right people on your discovery calls in the first place (and by *right* we mean people who are already convinced you can help them, who are ready to do the work and have the means to invest), means you are more likely to convert your calls.

Attract the right people

Be clear about what the call is for and what people will get from calling you

- Put a time limit on them.
- State who the calls are not for e.g. if you're **not ready** for action, if you **don't** want make a change, if you just want to chat but **don't want** to commit.
- Being clear about who the calls are for and what you get, should limit or remove time-wasters or no-shows.

Attract the right people

- Stop saying "call me for a chat."
  These calls are *not just for a chat*, they're to find out if you're a good match to work together and solve their problem.

- Stop saying "no obligations" when you talk about your discovery calls.
  You are never going to force someone to buy from you, but you *are* going to offer them something at the end (if they're a good fit).

Mindset block:

I don’t think people know what a ‘discovery call’ is, should I call them something different?

Calendar and reminder set-up

Calendar and reminder set-up

Make it easy for people to book a call with you by using an online calendar

If you only have a 'Contact Me' page it can feel really daunting or overwhelming for people to know what to write.

It's wasting your time and theirs to do a long-winded ping-pong of emails arranging a mutually agreed time to talk and you will find people suddenly go cold.

Appointment scheduling software for wellness businesses

	Calendly	AppointLet	You Can Book Me	Acuity	Booking Hawk	SetMore
Price (when paid annually)	Basic free Premium $8 p/m Pro $12 p/m	Free Premium $8 p/m	Free Paid $12 p/m	Free Emerging $16 p/m	€11.14 p/m for Platinum (30 day free trial)	Free Premium $5 p/m
Number of event types	1 type on basic. Unlimited on premium.	Unlimited, even on free	1 type on free. Unlimited on premium.	Unlimited, even on free	Unlimited	Unlimited, even on free
Embed on own website	Yes	Yes	Yes	Yes (on paid plans)	Yes	Yes
Customisable	Personalised URL link. Calendly branding can only be removed on Premium / Pro	Add your own logo and personalised URL links. Disable Appointlet branding on Premium	Upload own logo and personalise URL link on free	Display own logo and use brand colours - only on Emerging plan	Upload own logo and personalise URL link	Personalise URL link
Zoom integration	Yes	Yes	Yes	Yes (on paid plans only)	Yes	Yes (on Premium or above)
Automated emails	Not on basic, only on premium	Non-customisable booking notifications only on basic, fully editable emails on premium	Only on paid plan	Only on Emerging plan upwards	Yes	Yes, up to 100 per month on free
Google calendar integration	Yes	Yes	Yes	Yes (on paid plans only)	Yes	Yes (on Premium or above)
Accept payments	Only on Pro	Via Stripe on Premium	Via Stripe on paid	Yes (on paid plans) via Stripe, Square or PayPal	Yes via Stripe	Yes via Square on Free or Square and Stripe on Premium

Prices and inclusions correct as of June 2023

vicky shilling

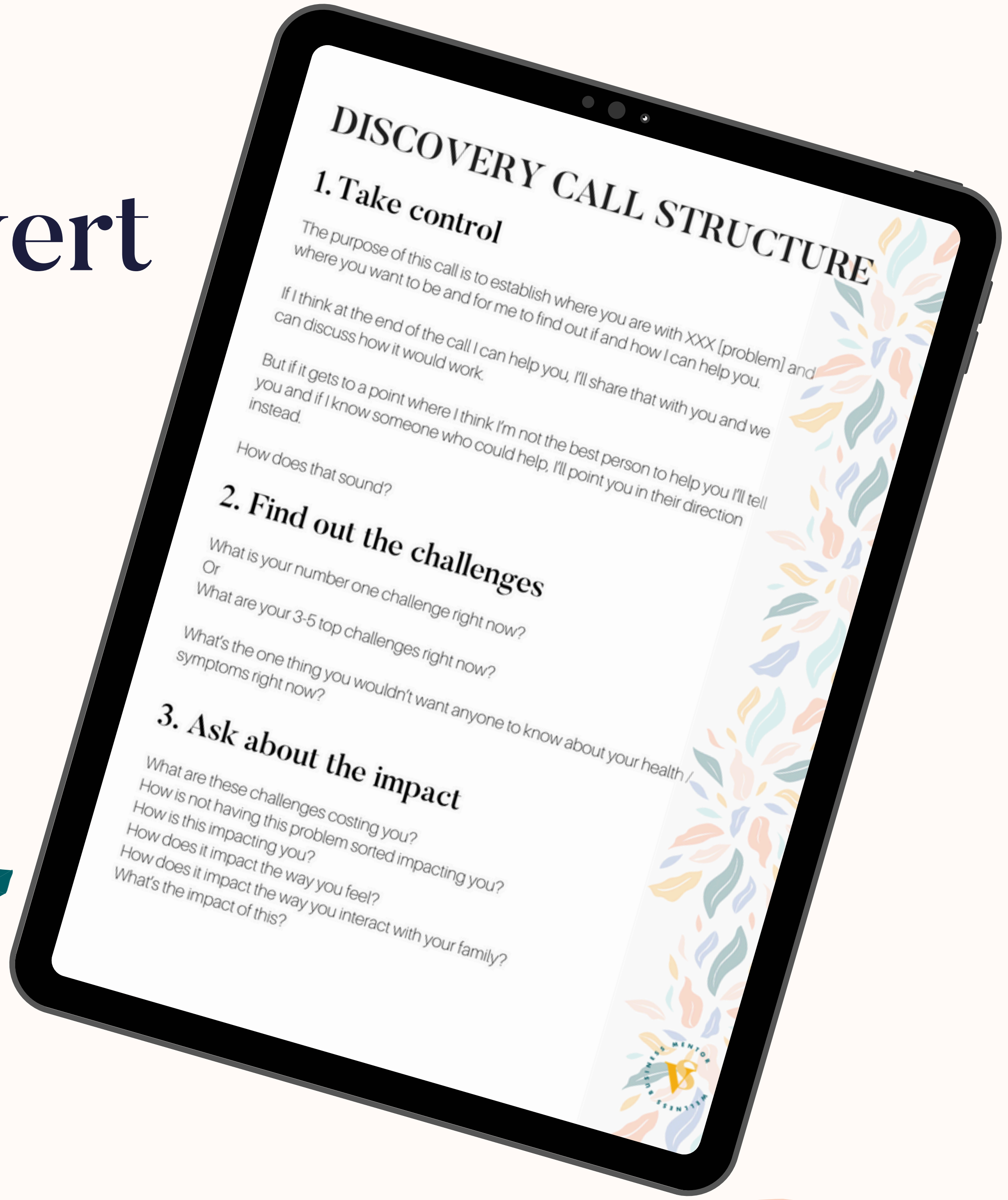
Call structure

Discovery call structure

1. Take control
2. Find out the challenges
3. Ask for the impact
4. Think ahead
5. What stops them?
6. Summarise
7. Sell

Download the crib sheet:
How to run discovery calls that convert

Use this crib sheet to accompany this training to guide you through future discovery calls and book more clients.



[Download your FREE copy](https://vickyshilling.podia.com/discovery-call-crib-sheet-ukihca)

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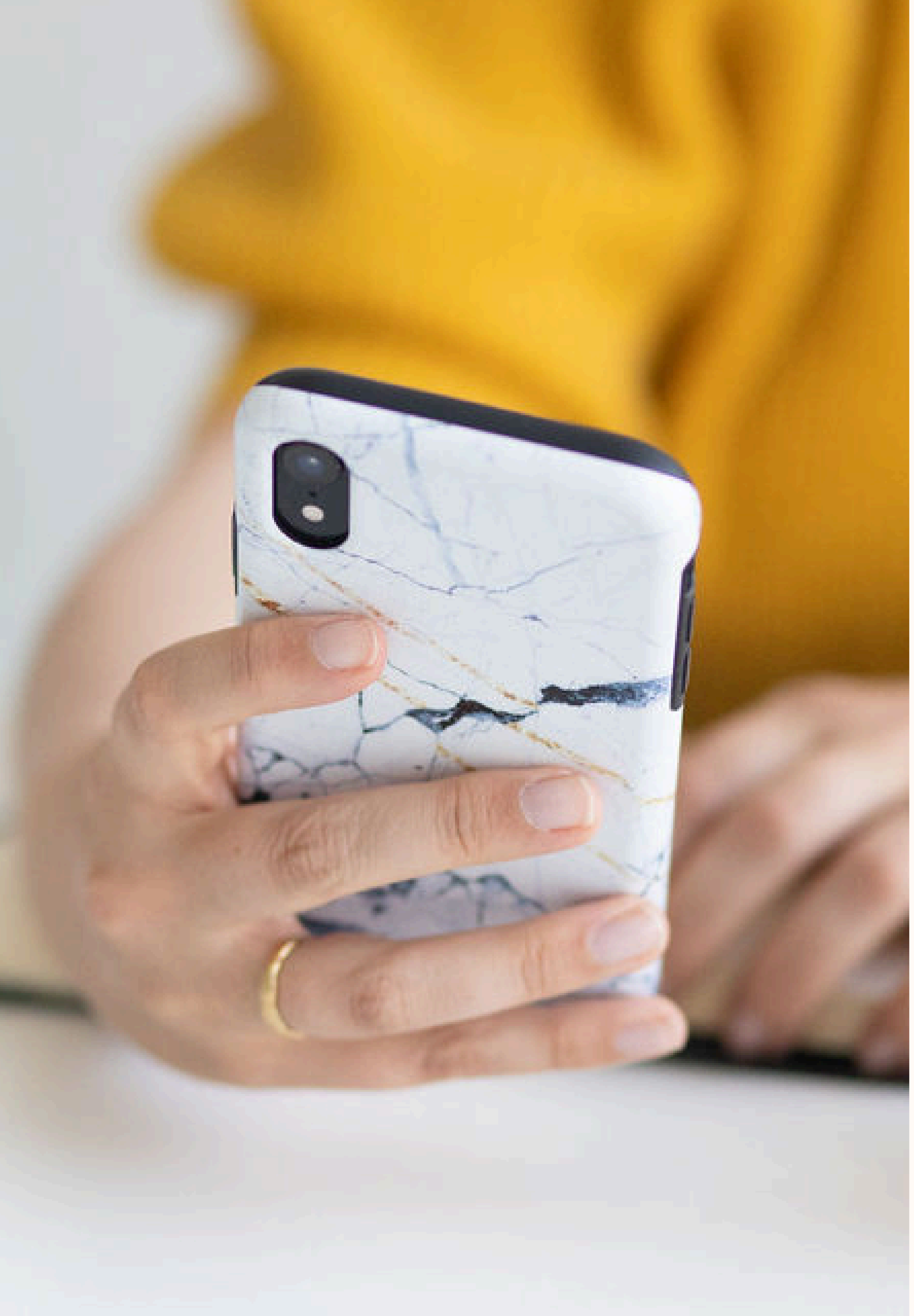


Discovery call structure

.1. Take control

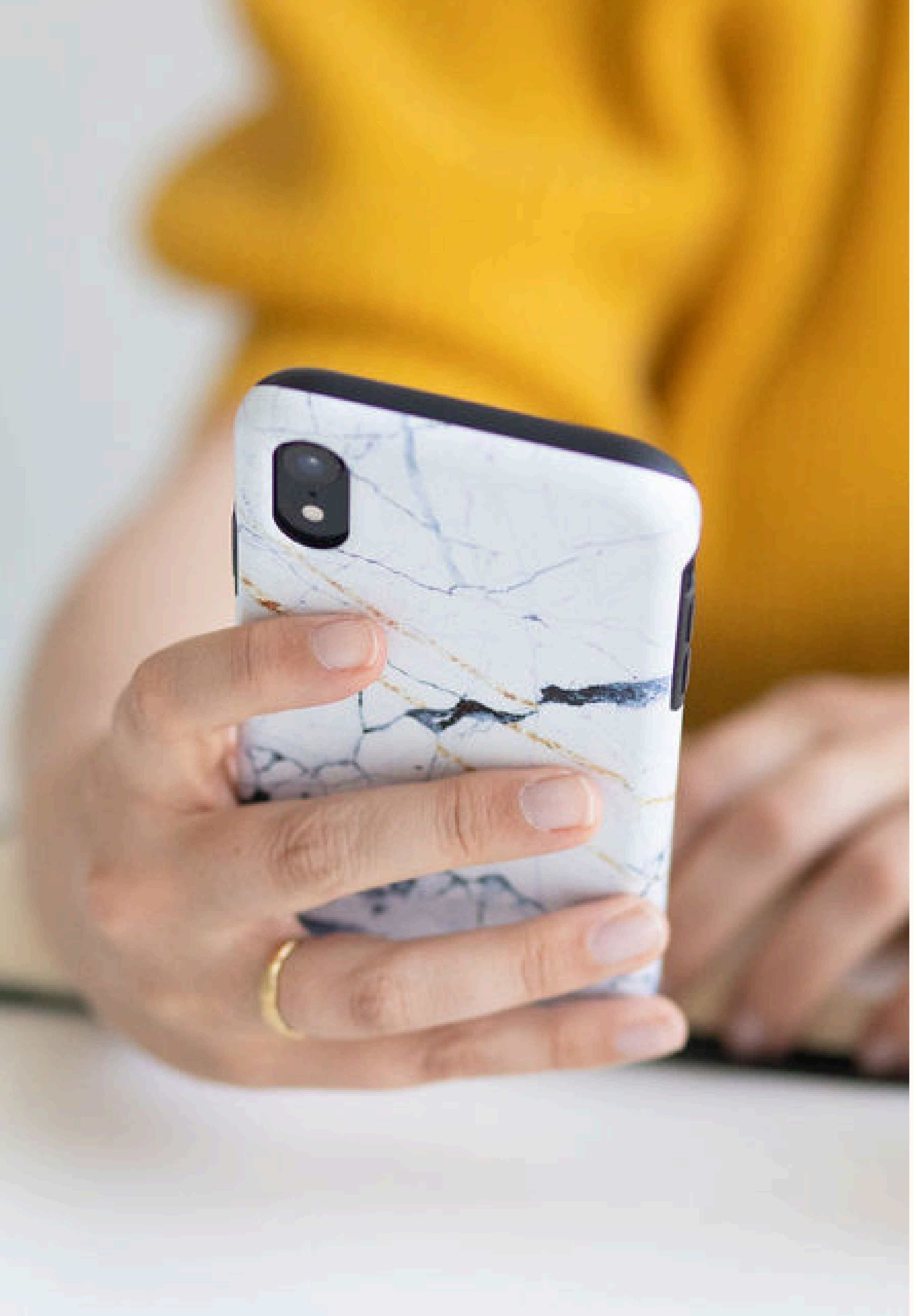
You need to re-state the purpose of the call at the very beginning. Then you both know where you stand.

The purpose of this call is to establish where you are with XXX [problem] and where you want to be and for me to find out if and how I can help you.

If I think at the end of the call I can help you, I'll share that with you and we can discuss how it would work.

But if it gets to a point where I think I'm not the best person to help you I'll tell you and if I know someone who could help, I'll point you in their direction instead.

How does that sound?



Discovery call structure

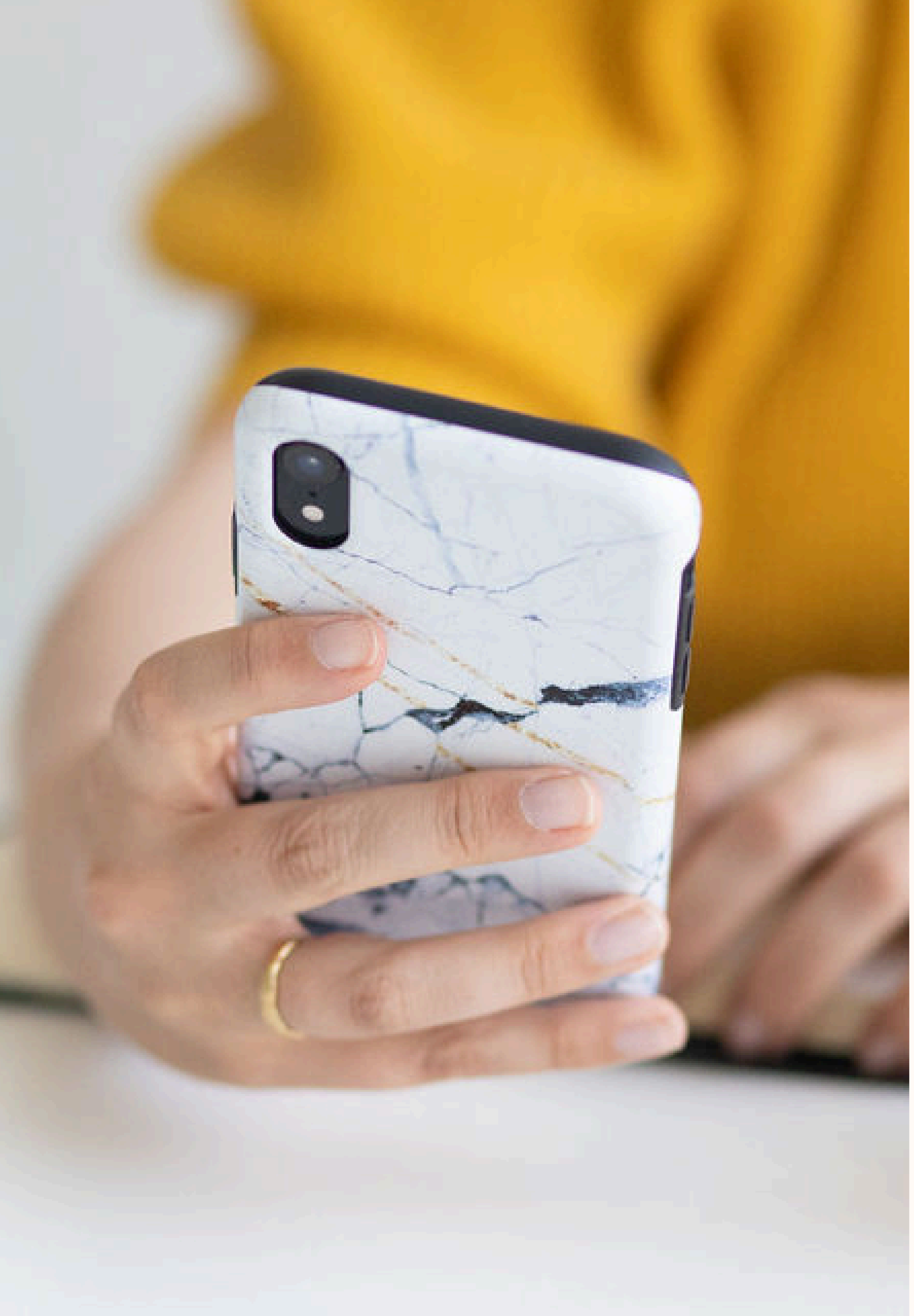
2. Find out the challenges

You need the prospect to identify for you and themselves what the biggest problem is they want solved. It will highlight the knowledge gap.

Keep repeating back what they're saying to show you're listening and clear on the issues.

What is your number one challenge right now?
Or
What are your 3-5 top challenges right now?

What's the one thing you wouldn't want anyone to know about your health/symptoms right now?

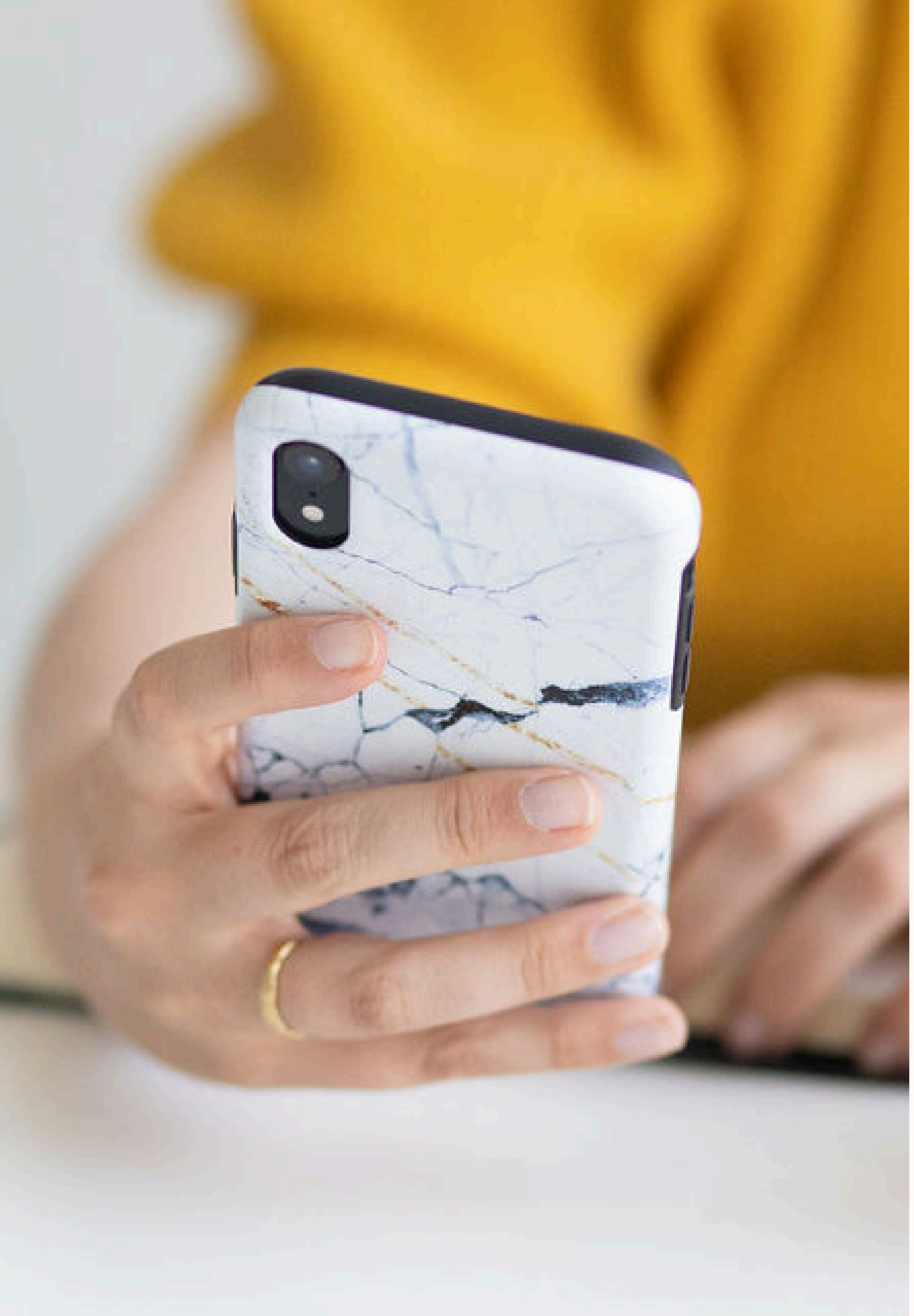


Discovery call structure

3. Ask about the impact

Find out the knock-on effect their challenges are having on them and their life. This helps highlight why it's important to fix it.

What are these challenges costing you?
How is not having this problem sorted impacting you?
How is this impacting you?
How does it impact the way you feel?
How does it impact the way you interact with your family?
What's the impact of this?



Discovery call structure

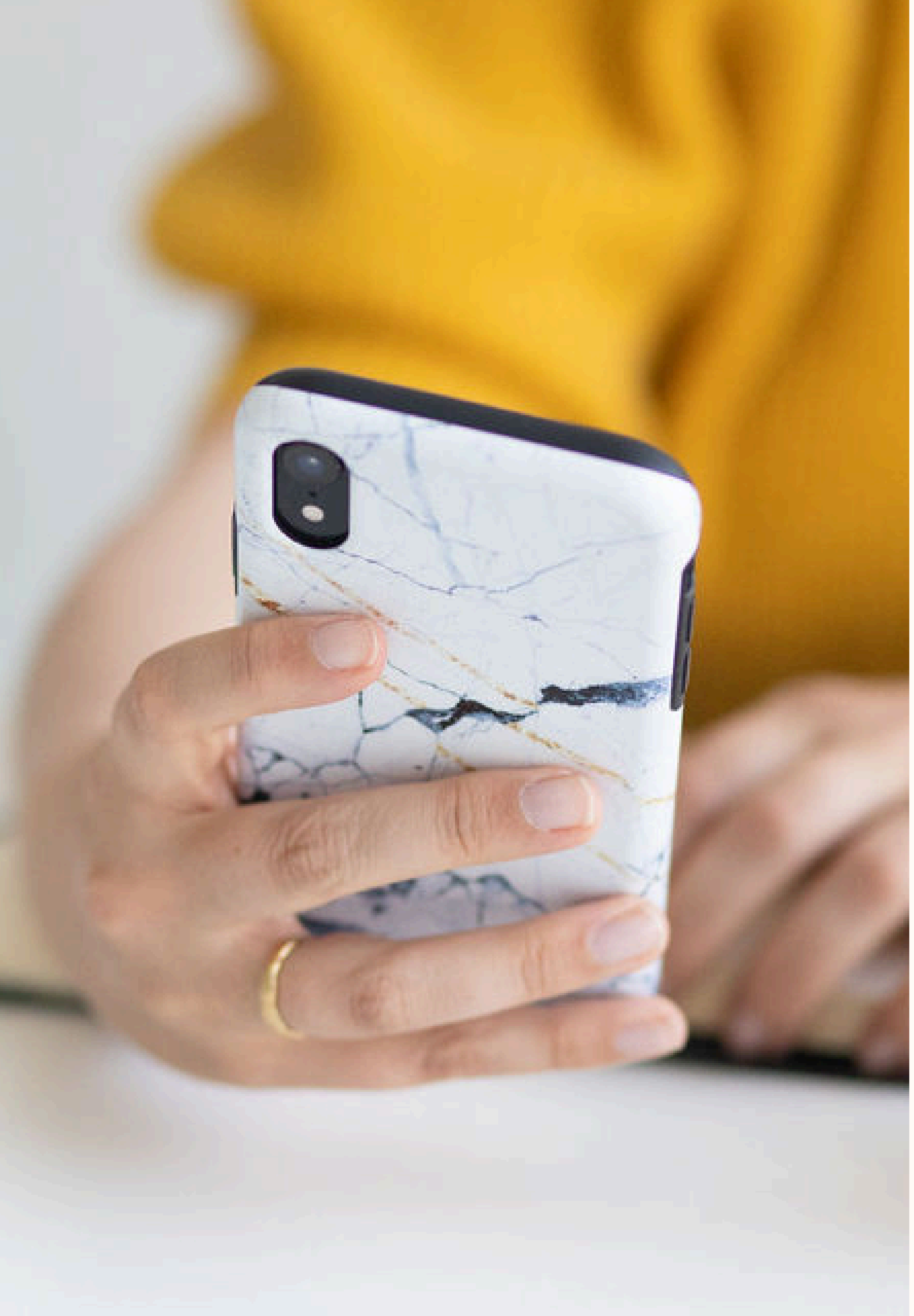
4. Think ahead

Now we flip to the transformation and result that they want. We want the prospect to paint the picture for you and themselves of how they want things to be.

Imagine if we worked together for XXX days and we solved XXX problem. Imagine the results we get together sticks with you and it keeps growing.

Fast forward 12 months time, talk to me about how different your life is and your health/symptoms is once we've sorted this problem out?

Does that excite you?



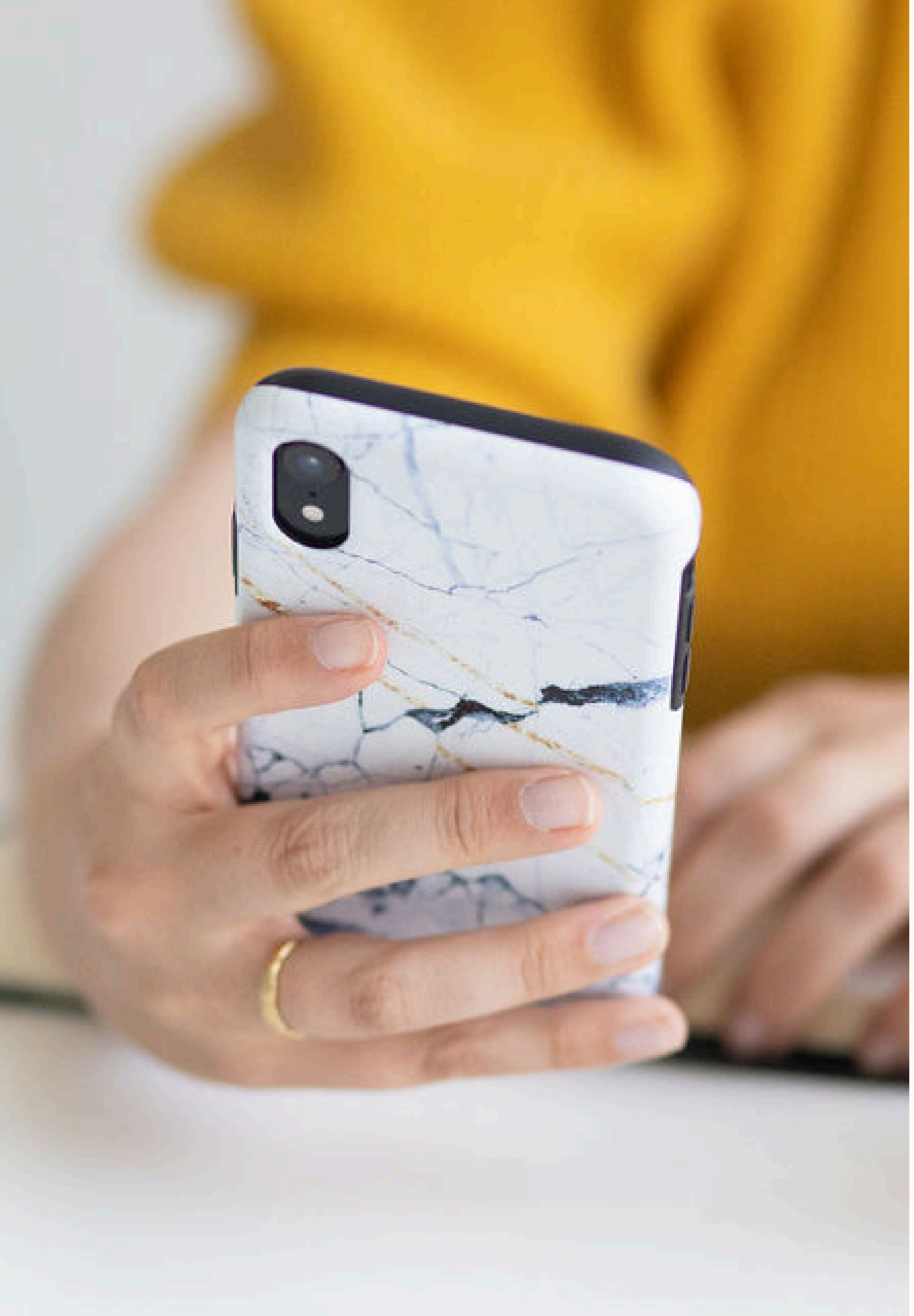
Discovery call structure

5. What's stopping them?

Circle back from the vision of the future to bring the knowledge gap into focus. This is where you can really identify if you are the person to help them plug that gap and finally get the result they want.

So what's stopping you from achieving that future?
What is holding you back from achieving this goal right now?
What's missing that would help you achieve this?

Why do you think this has been your struggle?



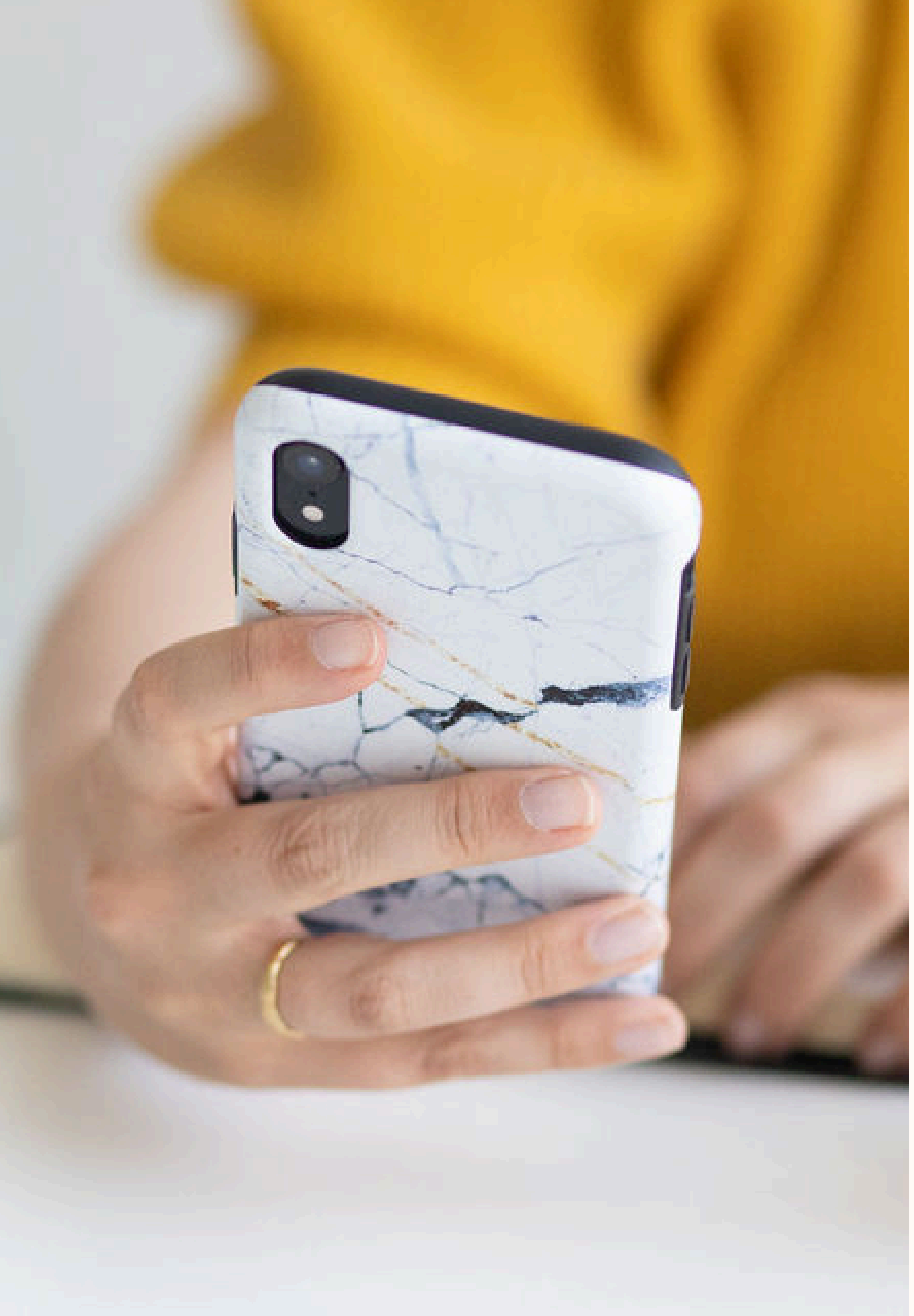
Discovery call structure

6. Summarise

Now it's time to sum up everything you've heard. Using their own words and language to paint the picture, you'll show you've listened carefully to the problem and know what it is they believe can solve it.

Okay so let me summarise.
Right now you are struggling with...
This is impacting you and your loved ones by....
You want to be/do/have/think....
But what's stopping you is....

Is that right?



Discovery call structure

7. Sell

You should now be clear whether this person is a good fit for what they offer.

If they are, now is your time to tell them about your package / programme / offer.

I think I can help. Shall I tell you how it works?
I think you'd be perfect for what I offer. Have you looked at my package or shall I talk you through it?
I can absolutely help you solve this problem. Let me explain how I suggest we work together.

Dealing with objections

Dealing with objections

Obviously once you've explained your offer you want them to just say "YES where do I sign?!"

Once you've told them about your offer, ask things like:

How does that sound?
What do you like about what I've just said?
What part of that don't you like the sound of?
Are there any parts that wouldn't work for you?

Dealing with objections

If they're a "hell YES I'm in!" then GREAT!

More importantly **WELL DONE**. You have effectively taken this prospect from problem to committing to the solution you offer.

You can jump now to Following Up.

Dealing with objections

However... they may have objections.

Firstly remember: objection is not the same as a rejection.

An objection is a worry or a question - it's a concern that the buyer has and needs you to address.

Dealing with objections

Secondly: Objections are signs your buyer is ready to engage with you to solve their problem.

In order to even form objections, buyers have invested time and energy in seriously thinking through your solution to their issue.

They have (or at least have started) to embrace their problem. They are starting to think through the potential gains and have envisioned your solution in their life.

Dealing with objections

Thirdly: Welcome objections rather than avoiding them.

You can proactively identify them (and invite them!) by asking questions like:

"Do you have any concerns around X?"
"Are there any obstacles that would stop you from investing?"
"How confident do you feel you'd see success from working with me?"
"You seem a little worried about X. What are your thoughts? / Tell me what makes you worried."

Dealing with objections

It's tempting when we hear objections to abort the call and leave the prospective client to make the decision by themselves.

BUT.... Ideally you want to get a decision *on the call*, rather than allowing them to go away and "think about it."

That's because if they are having doubts you want to tackle them head on, rather than let them fester and grow in their heads after the call as inevitably they'll talk themselves out of it.

You need to get brave and talk through the objection with them!

Dealing with objections

Dealing with objections

You want to:

1. Hear the objection
2. Isolate it
3. Explore it
4. Respond to it

Dealing with objections

Hear the objection

If they have objections you don't want to argue with them, resist them or correct them.

You want to make them feel **heard** and **understood.**

You don't want or need to argue with them!

Dealing with objections

Hear the objection

Listen. Pause. Clarify and repeat back the objection e.g.
Okay, so what I'm hearing is it sounds great but XXXX.

I understand how you FEEL and I totally agree with you.

I've talked to many people like you who FELT exactly this way.

What they FOUND is taking time to explore it, they can make a decision one way or another.

Dealing with objections

Isolate it

We want to be sure this objection they're giving us is actually the reason they're not booking.

"Can I just check....Let's pretend XXXX wasn't there. Is there anything else that would stop you booking?"

e.g.
Objection = money.
Let's pretend this was free. Is there anything else you'd have concerns about?

Objection = time.
Let's pretend you had all the time in the world. Is there anything else about the programme you're not sure about?

If a new objection appears, answer it or go back to hearing it.

Dealing with objections

Explore it

When you hear objections, you want to do all you can to keep the conversation going in a natural way.

If you hear your prospect pulling back, asking follow-up questions can be a tactful way to keep them talking.

Don't ask questions that can be answered with a simple "yes" or "no". Instead ask open-ended questions that allow your prospect to continue expressing their thoughts on what you're offering (What, Why or How).

The more information they provide, the more you have to work with.

Dealing with objections

- What do you think your partner needs to hear to be ready to invest?
- What are your priorities right now?
- What impact do you think this would have if you were able to invest?
- How should we move forward from here?
- How important is it to you to get this sorted?
- Why do you think it's key to solve this problem right now?
- If this problem remains unsolved, how will it affect you in future?
- What budget did you have in mind for something like this?
- What motivated you to take this call with me?
- What will happen if we don't agree to work together at the end of this call?
- What would you say if you were me?

Dealing with objections

Respond to it

Once you have heard, isolated and explored the objection you can now respond with:

- a recommendation
- an alternative
- a next step

designed to address the customer's concern and close the transaction.

Dealing with objections

Respond to it

A recommendation

- Another resource they could try
- Something they could try to solve the objection

An alternative

- Another offer that might work (a one-off Power Hour for example)
- An alternative practitioner to contact

A next step

- A follow up call in two weeks time

Dealing with objections

Respond to it

<u>PLEASE NOTE</u>

Responding with recommendations or alternatives is <u>not an opportunity to offer discounts or to undermine your offer by suggesting something smaller / less time commitment or cheaper.</u>

If you truly believe your offer is perfect for them and will actually get them the result they are looking for, you need to stand by it and insist it is the best way forward.

If you plant a seed of doubt with them that you're not sure it's the best option, they won't have the confidence to invest.

Dealing with objections

Example 1: I can't afford it right now

1. Hear the objection

I totally get it, investing in something like this is a big decision. I have conversations like this all the time.

2. Isolate it

Can I just check, if this was totally free, would you have any other concerns about going for it?

Dealing with objections

<u>3. Explore it</u>

Okay, I understand, I really do. Personally I try not to say “I can’t afford things.” I prefer to use “it’s not a priority right now.” What do you feel are your priorities right now, if it’s not this?

<u>4. Respond to it</u>

I’m completely with you, you have to prioritise what’s most important for you at this moment.

a) For where you’re at right now, if you aren’t in a place to invest I recommend you try XXX

b) Would it be an option to do a one-off Power Hour to help you get started with making some progress on this problem?

c) Shall I make a note to follow up with you in a couple of month’s time to see how things are going and if anything has changed?

Dealing with objections

Example 2: I need to check with my partner

1. Hear the objection

Of course, investing in something like this definitely needs everyone on-board.

2. Isolate it

Can I just check, before you go to your partner, do *you* have any other questions or concerns about going for this?

Dealing with objections

<u>3. Explore it</u>

Great, that's good to hear you're totally behind doing this! What do you think you need to say to convince your partner? What will they ask that you need to be ready for?

<u>4. Respond to it</u>

Fab, so do you feel you've got everything you need to talk it through with them? Shall I make a note to follow up with you next week to see how the conversation goes?

Dealing with objections

Example 3: Life is a bit busy right now, I'm not sure I can commit

1. Hear the objection
Of course, doing something like this does take time and commitment to get the best results.

2. Isolate it
Can I just check, if you had all the time in the world, do you think this is the right solution for you?

Dealing with objections

3. Explore it

Okay, that's good to know. But if you're too busy to go ahead and this problem remains unsolved, how will it affect you? What kind of things are you doing to try and make more time for yourself?

4. Respond to it

It's tough isn't it.

a) Can I recommend XXX for great tips on making time for yourself, even when you have a hectic life like you do?

b) What sort of time do you think you could commit to right now? Is there something we could put together that would work on your time-frame?

c) Shall I make a note to follow up with you to see if things quieten down and you're able to focus on this next month?

Dealing with objections

Example 4: I think I'll just give it a go by myself and see how I do

<u>1. Hear the objection</u>

Of course, that is totally your choice if you feel that's going to get you the results.

<u>3. Explore it</u>

When we discussed the problem earlier, you said accountability as a huge factor for you. Where do you think that will come from this time?

What do you think is the biggest problem you'll face doing this yourself?

What's happened before when you've done this alone?

Dealing with objections

4. Respond to it

a) Can I recommend XXX book / podcast / resource if you're going to do this without support for the time being?
b) If I were able to support you doing this by yourself, how could that look?
c) Shall I make a note to follow up with you and see how you're doing by yourself in a few weeks time?

Dealing with objections

You will only learn how to handle objections well by practicing.

You will only know the right words to say when you've done it lots of times, and seen what works and what doesn't.

There *will* be calls where it doesn't work, it feels awkward or you are at a loss for words or just terminate the call without a decision (even when they were an ideal client).

That. Is. Okay.

Learn from it and move on.

Dealing with objections

Sometimes people just won't commit on the call. That's okay too.

It doesn't mean you're a bad sales—person. It doesn't mean *no-one* will ever book you.

If you feel you've gone as far as you can go, that you've made them really aware of what their problem is, you've made as clear as possible the solution you offer and the gain they will make if they invest, you have to let it go and trust they'll make the right decision for them.

Try to book in a follow up call with them, and if they won't even commit to that, just make a note in your diary to check in with them again when it feels right.

Following up

Following up

- Explain what will happen with regard to payment and contract. Make sure these are issued promptly i.e. within 24 hours of the call where possible.
- Get your first appointment booked in while on the call, if appropriate.
- Don't be afraid to follow up if they go quiet / disappear / don't sign or pay straight away. Again, do this promptly.
- If the client hasn't paid immediately, assume they have been busy or are just sorting their finances out e.g. "You've probably been busy and haven't got round to this yet so I'm just reminding you." Rather than assuming they have got cold feet. Stay positive!

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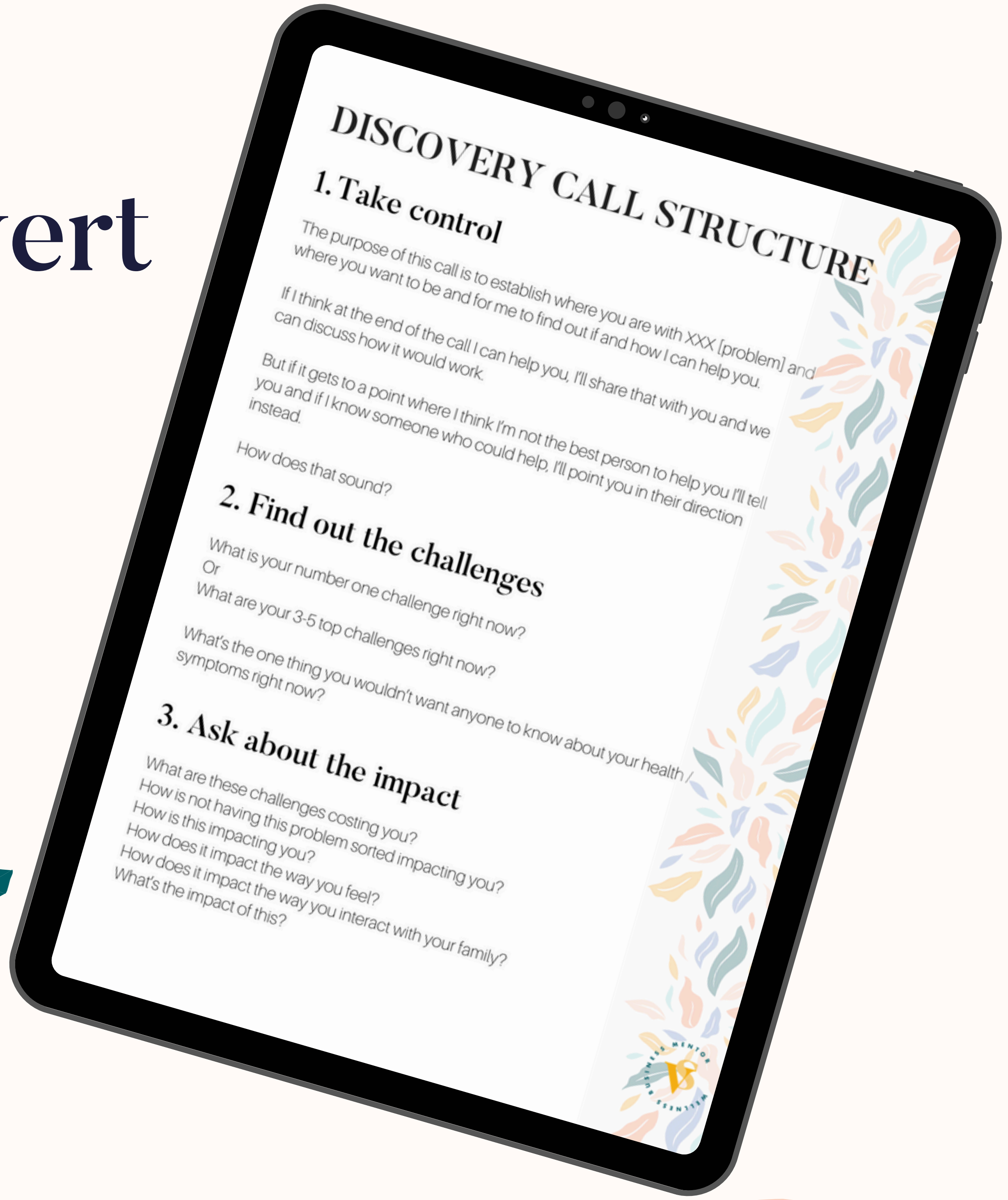
DISCOVERY CALL STRUCTURE

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