

CHEAT SHEET

The Ultimate Client Letter

For every stage there's an opening letter for your clients.

STAGE 1: OPEN THE CONVERSATION

Hi _____ (first name). I'm looking forward to supporting you over the next 30 minutes. Is this still a good time?

Great! The reason I'm so excited to support you is because I appreciate _____ about you. And I see _____ is possible for you. What are you hoping to get from our session today?

Sounds good. I promise you'll walk away with some strategies to support you with _____ (what they said they wanted to get from the session). And in order to support you, I would like to start by sharing a little about myself, so you understand why I'm so passionate about this work. Then I want to understand more about you and _____ (challenge), so I have a few questions for you. Once I know more about what you're looking for, I'll make some recommendations to help you get _____ (what they said they wanted to get from the session). And finally, if it seems like it might be a good match, we'll talk about the possibility of working together more deeply...how does this sound?

Great. I'll start by sharing some of my story. (Share 1-2 minute version of your Hero's Journey Story.)

STAGE 2: FIND OUT WHAT THEY'RE LOOKING FOR

Now that you know about me, I want to know more about you and what you're looking for.

What are your biggest challenges when it comes to _____ (the problem you solve)?

What have you tried to do to resolve _____ (the challenge)? Did it work?

What is not resolving _____ (the challenge) costing you? How much longer are you willing to deal with _____ (the challenge)? What do you want instead?

What would your life be like if you were able to get _____ (the solution you offer)? On a scale from 1-10, how committed are you to getting _____ (the solution you offer)?

STAGE 3: SHARE A RESOURCE

Can I make some recommendations as to how to get _____ (what they said they wanted to get from the session)?

Make 3 recommendations.

STAGE 4: SEE IF YOU'RE A MATCH

How does this sound to you?

If we were to work together, what would you see yourself getting?

STAGE 5: ASK FOR THE NEXT STEP

Do you have any questions?

STAGE 6: DANCE WITH CONCERNS

Are there any concerns that would stop you from moving forward?

So are you ready to get started?