Sales Mastery:

Roadmap/Exploration Session Process

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## Introduction to The Roadmap/Exploration Session Process

Whereas the Discovery Session helps you qualify if someone is the right fit, The Roadmap or Exploration Session is where you dive deeper and get them started. This framework **positions** you and your product perfectly in the eyes of the customer, **stretches the gap** between where your prospect is and where they want to be, and enables you to help them get started in a way that is seamless and enjoyable for them. When done well, this process will not only enable more prospects to buy more from you, but to do so with excitement.

The goals of The Roadmap Session are simple:

1. To open the conversation in a way that reduces buyers resistance and increases buyers acceptance.
2. To do a deep dive into the prospects current situation, goals, and challenges so that you can tailor your solution accordingly.
3. To stretch the gap between where they are and where they want to be in a way that motivates them to take action.
4. To systematically eliminate and prevent objections at each stage, clearing any barriers that might get in the way of them saying ‘yes’.
5. To test close in a way that enables you to know exactly how to tailor your solution before you present it

Implementing this framework will significantly increase conversions, reduce the time it takes to make a sale, and often increase how much each customer spends with you because you will have found more needs and their level of certainty will be higher.

Once you have adapted and installed The Discovery Session Process and The Roadmap Session Process, this becomes your end-to-end sales process that will underpin not just your sales performance but the performance of your sales team.

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## The 9 Steps Of The Roadmap/Exploration Session Process

Step 1: Reconnect

Step 2: Frame Up

Step 3: Memory Anchor

Step 4: Destination - Goals and Gaps

Step 5: Roadblocks

Step 6: Summary and Roadmap

Step 7: Transition

Step 8: Tailor The Offer

Step 9: Get Started

## STEP 1: RECONNECT

DESIRED OUTCOMES:

1. Make sure they are ready to have the conversation
2. Confirm all decision makers are present
3. Ensure there are no tech or environmental barriers that will prevent you from having a seamless conversation

THINGS YOU DO AND SAY:

### 1.1 Confirm the technology is working fine, decision makers are present and they can both see and hear you and the screen

“Hi [Name], great to see you again. Can you see and hear me ok?”

If other decision maker isn’t visible:

“And how’s [other decision maker name] traveling, they’ll be joining us in a moment?”

If the tech is not working, or both decision makers are not present, do not continue.

Decision makers not all present:

“I know this is a really important conversation for you both so we need you both here otherwise there’s nothing we can do that’s going to be helpful, let’s reschedule the call, I have had a spot open up [this afternoon / tomorrow morning], how does that suit you both?”

If tech is not working, try to find a solution and if you can’t then reschedule:

“There are aspects today that I’m going to be showing you, so you definitely want to be able to see me and my screen.”

Troubleshoot with them.

“Is there someone there who can help get it working for you?”

If still can’t get it to work:

“I know this is a really important conversation for you both and there are important aspects that I’ll need to show you in order to develop your plan, otherwise there’s nothing we can do that’s going to be helpful, let’s reschedule the call, I have had a spot open up [this afternoon / tomorrow morning], how does that suit you both?”

### 1.2 Observe and mirror their physiology and pacing

Observe whether this person wants to spend time connecting, wants to have a casual chat about nothing in particular, or wants to get straight to it.

You want to have the behavioral flexibility to mirror their demeanor, connect with them on their level, and walk them through the session in the way that they like to receive information.

### 1.3 Ready to dive deeper?

“I really enjoyed our Discovery Session [yesterday / last week], and I appreciate you being so open and sharing what you did, it makes a big difference in really knowing the why and how we can help.

Are you ready to dive deeper into your Roadmap Session, now?”

## STEP 2: FRAME UP

DESIRED OUTCOMES:

1. Shows them they’re in safe hands because you have a process that you take people through, they’re not worried about “what’s going to happen”.
2. Sets the parameters of the conversation
3. Let’s them know that this session is about building a plan and making a decision today

THINGS YOU DO AND SAY:

### 2.1 Explain this call in three steps

“Hey, I’ve got a framework I like to use for sessions like this, there’s three things I’d like us to do today:

1. We’ll have a really good look at where you want to go. What your goals are, what your vision is. The clearer I am about where you want to go, the easier it’s going to be for us to put a plan together, is that cool?
2. Once I know where you want to go, we’ll have a look at how it is right now. Warts and all what’s good, what’s not, what’s working, what’s broken. We’re looking at the raw ingredients so we know how to best put a plan together, is that cool?
3. Once I know where you want to go, and we’re clear about what’s working and what’s not, then we’ll make a list of all of the challenges and roadblocks that are holding you back, so we can turn those into a roadmap and from that will arise whether we believe [your product / service] is the right fit right now. If it is, we can talk about how we tailor what’s here to help us **implement the roadmap**. Does that work?”

### 2.2 Give them anticipation of feedback and direction

[Casual tone, understated:] “Great, and just so you know my style, I’m usually just pretty direct and straight to the point, so if I think something’s going to work I’ll let you know and if I don’t I’ll just tell you. Is that cool?”

### 2.3 Give them a feeling of control

“Great. Like I said it’s a loose framework to ensure that we cover all the bases and you walk out of here with a really good plan. But I just want to let you know this call’s about you, not about me. If there’s something that I don’t know about or don’t ask about and you think it’s important, I want you to take me wherever you want to go. How does that sound?”

## STEP 3: MEMORY ANCHOR

DESIRED OUTCOMES:

1. Fire a Memory Anchor that reconnects them with their reasons for wanting to have the discussion. This places them and their motivation as the reason we’re having the conversation, not the potential sale of the product
2. To connect with them at a human and emotional level. This is where you want them to start opening up and for you both to establish a deeper level of rapport, before heading in to the Green Brain Deep Dive in the next section
3. Reconnect them to their primary intent, framing the conversation as a response to their intent

THINGS YOU DO AND SAY:

### 3.1 Fire Memory Anchor

“Before we start I’m curious, I know we covered a fair bit of ground the other day but **what stood out for you the most from our last chat?**”

“And what was it that connected and resonated with you that **made you want to have today’s conversation?**”

**ADVANCED TIP: ALF**

1. Ask. Ask a question.
2. Listen. Listen to the answer.
3. Formulate. Formulate your next question based on their response.

Example questions:

“That’s great, what is it about that that stands out for you right now?”

“I thought you were going to say that, tell me why that resonates…”

“Why do you say that?”

“In what way?”

“That’s super interesting, elaborate on that for me…”

“How specifically?”

## STEP 4: DESTINATION - GOALS AND GAPS

DESIRED OUTCOMES:

1. To help the customer identify very clearly where they want to be and where they are now
2. To highlight the gaps that your product or service will help them close when you Tailor the Offer in Step 8
3. To get the prospect painfully aware of **the cost of not having your solution**, this boosts desire, creates a strong sense of urgency and eliminates objections coming up later

THINGS YOU DO AND SAY:

### 4.1 Help them imagine and feel into their broad vision for one or three years time

“And if we imagine one / three years into the future… Where do you want your [insert topic here: health & fitness, property portfolio, home interior, business, website, marketing] to be three years from now?”

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**4.2 Help them get clear about their 12 month goals in relation to where they are now, this is done best by asking 3 - 5 questions that highlight the most important and pressing goals and gaps of the prospect**

To do this, tailor these template questions to your business and offer:

1. “What’s your ideal [a] 12 months from now? Ok great, and your [a] at the moment?”
2. “What sort of [b] are you doing 12 months from now? Ok great, and do you know, approximately, what your [b] is today?”
3. “How many [c] do you have a year from now? Ok great, and how many [c] do you have today?”
4. “What’s happening in relation to [d] one year from now? Ok great, and where are you with regards to [d] today?”
5. “Brilliant, and lastly, how do you want your [e] to be a year from now? Ok great, and broadly speaking, how would you say it is today?”

Here are examples of those template questions applied to different businesses and offerings:

**Investment Property Consultant / Real Estate Agent**

1. What's your ideal property portfolio look like 12 months from now? Ok great, what does your property portfolio look like at the moment?
2. How much equity are you aiming to have 12 months from now? Ok great, do you know, approximately, what your equity is today?
3. How many properties do you plan to have a year from now? Ok great, how many properties do you have today?
4. What’s happening in relation to your property investments one year from now? Ok great, where are you with regards to your property investments today?
5. Lastly, how do you want your cash flow from investments to be a year from now? Ok great, broadly speaking, how would you say it is today?

**Business Consultancy**

1. What's your ideal business growth 12 months from now? Ok great, and where is your business growth at the moment?
2. What sort of profit margin are you targeting 12 months from now? Ok great, and do you know, approximately, what your profit margin is today?
3. How many clients do you aim to have a year from now? Ok great, how many clients do you have today?
4. What’s happening in relation to your business expansion one year from now? Ok great, where are you with regards to your business expansion today?
5. Lastly, how do you want your employee productivity to be a year from now? Ok great, broadly speaking, how would you say it is today?

**Digital Marketing Agency**

1. What's your ideal website traffic 12 months from now? Ok great, and where is your website traffic at the moment?
2. What sort of conversion rate are you aiming for 12 months from now? Ok great, and do you know, approximately, what your conversion rate is today?
3. How many social media followers do you want a year from now? Ok great, how many social media followers do you have today?
4. What’s happening in relation to your brand visibility online one year from now? Ok great, where are you with regards to your brand visibility today?
5. Lastly, how do you want your customer engagement to be a year from now? Ok great, broadly speaking, how would you say it is today?

**Financial Advisors**

1. What's your ideal financial situation 12 months from now? Ok great, what does your financial situation look like at the moment?
2. What sort of savings or investment returns are you aiming for 12 months from now? Ok great, and do you know, approximately, what your savings or returns are today?
3. How many investment portfolios do you aim to have a year from now? Ok great, how many investment portfolios do you have today?
4. What’s happening in relation to your retirement planning one year from now? Ok great, where are you with regards to your retirement planning today?
5. Lastly, how do you want your financial risk management to be a year from now? Ok great, broadly speaking, how would you say it is today?

**Accountants**

1. What's your ideal financial statement look like 12 months from now? Ok great, what does your financial statement look like at the moment?
2. What sort of tax savings are you aiming for 12 months from now? Ok great, and do you know, approximately, what your tax savings are today?
3. How many financial audits do you aim to have a year from now? Ok great, how many financial audits have you had so far?
4. What’s happening in relation to your cash flow management one year from now? Ok great, where are you with regards to your cash flow management today?
5. Lastly, how do you want your financial compliance to be a year from now? Ok great, broadly speaking, how would you say it is today?

**IT Consultant Firms**

1. What's your ideal IT infrastructure look like 12 months from now? Ok great, what does your IT infrastructure look like at the moment?
2. What sort of system uptime are you aiming for 12 months from now? Ok great, and do you know, approximately, what your system uptime is today?
3. How many IT support tickets do you aim to resolve a year from now? Ok great, how many IT support tickets do you resolve today?
4. What’s happening in relation to your cybersecurity one year from now? Ok great, where are you with regards to your cybersecurity today?
5. Lastly, how do you want your data management to be a year from now? Ok great, broadly speaking, how would you say it is today?

**Graphic Design Agency**

1. What's your ideal branding look like 12 months from now? Ok great, what does your branding look like at the moment?
2. What sort of customer engagement are you aiming for with your designs 12 months from now? Ok great, and do you know, approximately, what your current customer engagement is today?
3. How many design campaigns do you aim to launch a year from now? Ok great, how many design campaigns have you launched so far?
4. What’s happening in relation to your social media presence one year from now? Ok great, where are you with regards to your social media presence today?
5. Lastly, how do you want your brand's visual consistency to be a year from now? Ok great, broadly speaking, how would you say it is today?

**Landscape Design Services**

1. What's your ideal landscape design 6 months from now? Ok great, what does your current landscape look like?
2. What sort of experiences do you want to be having in this environment 6 months from now? Ok great, and is the experience like today?
3. How many elements (like a pool, garden, outdoor seating) do you want to have in your landscape six months from now? Ok great, how many such elements do you have today?
4. What’s happening in relation to your outdoor living space six months from now? Ok great, where are you with regards to your outdoor living space today?
5. Lastly, how do you want your garden area to be six months from now? Ok great, broadly speaking, how would you say it is today?

There is one important variation to the template questions when the customer experiences the benefit from the product or service immediately after purchase rather than needing to wait for a period of time. Here you want to ask them about how things will be different before and after they get the benefit of your product or service. Here are two examples:

**Boat Sales**

1. How would you like your weekends or holidays to look once you own a boat? Ok great, how do you currently spend those times?
2. Imagine you've just bought your boat, what type of activities or adventures are you engaging in? Ok great, and what kind of recreational activities do you currently do?
3. What's the experience you are looking for when you're out on the water with your new boat? Ok great, and can you tell me about your current experiences with boating or outdoor activities?
4. Once you've bought your boat, how do you envision it enhancing your lifestyle or family time? Ok great, and how are those aspects of your life currently?
5. Lastly, how do you see owning a boat impacting your relaxation or stress relief? Ok great, and how do you currently manage these aspects?

**Website Development**

1. Once your new website is live, how do you envision it improving your business' online presence? Ok great, and how would you currently describe your online presence?
2. How many website visitors do you want to attract once the new website is live? Ok great, how many visitors do you have today?
3. What sort of conversion rate to generating leads and sales do you want to achieve with your new website? Ok great, and do you know, approximately, what your conversion rate is today?
4. What kind of functionality or features do you see your new website providing to enhance user experience? Ok great, and how are the features and functionality of your current website?
5. Lastly, how do you see your new website reflecting your brand and business identity? Ok great, how would you say your current website reflects your brand identity?

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### 4.3 Reflect back to them and emphasise the most obvious gap

The key here is to **quantify the cost of NOT** having your solution.

“Ok great, so just to summarise, we’re currently [here] and we want to be [there]? So this is a [gap between here and there] conversation right now? Wow. I can see why you reached out.”

**Industry specific examples:**

**Health:** Ok great, so just to summarise we’re currently at 90kg’s and we want to be at 75kg’s… So this is a 15kg conversation right now? Wow. I can see why you reached out.

**Solar Panels:** Ok great, so just to summarise we’re currently spending $1,000 a quarter on electricity… So this is a $4,000-a-year conversation right now? Wow. I can see why you reached out.

**Boat Sales:** Ok great, so right now you’re not spending much time with the family, and you want to be able to duck away for overnight trips or weekends once a month… So this is a vehicle to spend more quality time with the ones you love each and every month? Wow. I can see why you reached out.

**Accounting:** Ok great, so just to summarise we are currently generating $2mil in revenue at 10% NPBT and we want to extend that to 25% … So this is a $300,000-a-year conversation right now? Wow. I can see why you reached out.

**Home Builder:** Ok great, so just to summarise we need to move into the property by the 17th or we will have to double up on our monthly mortgage payment which is $4K. So if the project runs over by a couple of months this is a $8K in out of pocket expense conversation right now? Wow. I can see why you reached out.

**Website Development / Online Marketing:** Ok great, so just to summarise we’re currently converting 6% of our traffic to leads and doing $2.4m a year, and we want to be at 12% that will enable you to do about $4.5m a year... So this is a $2.1m conversation right now? Great, and I think that’ll just be a starting point, won’t it? Wow. I can see why you reached out.

**Technology Implementation:** Ok great, so just to summarise, we’re currently employing 3 people for a total $260,000 per annum to do the work that the technology and processes will be able to do instead…. So this is a $260,000 conversation right now? Great, and I think that’ll just lay the foundation for future scale, won’t it? Wow. I can see why you reached out.

**Property investment:** Ok great, so just to summarise we currently have one property, and we want to be at three properties in three years and each property makes about $90,000 a year... So this is a $180,000-a-year conversation right now? Great, and I think that’ll just be a starting point, won’t it? Wow. I can see why you reached out.

**Business Coach:** Ok great, so just to summarise we’re currently doing $3.2m and we want to be doing $5m… So this is a $1.8m conversation right now? Wow. I can see why you reached out.

## 

## STEP 5: ROADBLOCKS

DESIRED OUTCOMES:

1. Now that you have identified where they are and where they are going, in this section you are going to help them identify what’s stopping them from getting there
2. This is where you move into doctor mode, asking questions about what is wrong so that you can make a diagnosis. It is here you want to elicit their problems and roadblocks.
3. Doing this well will cause them to understand their problems better. Even though we haven’t reached the solution stage yet, when this section is done well the prospect will find it therapeutic to have someone really understand the problems they are experiencing. The salesperson that best understands and can best articulate the problems of their prospect, wins their prospect.

THINGS YOU DO AND SAY:

### 5.1 Elicit their biggest challenges using the Five W’s and H

When it comes to asking the right questions, the model our members find most helpful is what we call 5Ws and H. This is a six step sequence you can use whenever you want to deep dive into your prospects' roadblocks and buying motivators.

1. **What [-]: “What’s the number one challenge you have around this, that if solved, would make the biggest difference?”**

This elicits where they need the most help from you, your product or service, it will give you a very specific and pointed need for your solution. Their response to this question will almost always be their number one driver in making a buying decision.

1. **Where: “Where do you feel not having [first priority] the way you want it is impacting you the most, both personally and professionally?”**

This question helps both you and your prospect understand their current problem state; it encapsulates their away from motivation. This question also helps your prospect to excavate what’s going on below the surface so that both of you understand why the problem state is a problem for them.

Listen for their response, then follow up with:

“I get it. And where do you think not having [second priority] the way you want it is impacting you the most?”

1. **Why Now: “Why is this important to you now? Why is this a now-conversation for you?”**

This question helps you establish urgency. One of the most common objections salespeople face is, “Thanks, that was great, let me go away and think about it.” When, early in the conversation, you ask the prospect to articulate why this is a “now-conversation” for them, you prevent this objection from arising further down the track, because you have already agreed that this is not a decision the prospect wants to delay.

If the prospect doesn’t express any urgency, we suggest politely wrapping the conversation by pointing them in the direction of something that will help them in the meantime. This is where the automated nurture sequence we discussed in Chapter Six: Marketing, comes into play. By placing them on an automated nurture sequence you can help them progres their thinking, and ensure you stay front of mind for when they are ready to pick up the conversation again.

1. **How: “How long have you been feeling this way?”**

Once your prospect acknowledges that they have been thinking about this solution for some time, and resolving it is at the forefront of their mind, they will not want to delay the decision any further. This question also helps prevent the “I want to think about it” objection from arising later in the process.

Alternative ways to frame this question include:

“How long has this concern been building up for?”

“How long has this been going on for?”

“When did you first notice this?”

1. **When: “When do you need to see this changed/done/completed by?”**

This question creates a deadline by which your prospect wants to reach a solution. It draws a line in the sand, and helps to provide impetus for them to act. It also gives you an understanding of their future timeline, and in doing so enables you to tailor your presentation of the solution accordingly.

1. **What [+]: “What’s your number one priority for you here, that if achieved would make the biggest difference for you?”**

You ask this question to help the prospect identify and articulate their desired outcome, and communicate how important it is to them. This number one priority is their toward motivation and will be the key to them ultimately buying at the end of the process.

Then repeat the 5 W’s and H for their second biggest challenge, and their third biggest challenge, by returning to Question 1:

**“What’s the second biggest challenge you have around this, that if solved, would make the biggest difference?”**

**OPTIONAL BONUS TIP # 1:**

If you have certain categories you usually work across, you can outline the different categories and ask for their core challenges in each category. For example, if you’re a health coach you might work across the three categories of nutrition, exercise and sleep. In this instance, you simply change the first question in the 5 W’s and H, to incorporate the category you are asking about:

1. **What [-]: “What’s the number one challenge you have around nutrition, that if solved, would make the biggest difference?”**

Complete the 5 W’s and H for nutrition. Then repeat the same process for exercise, and then again for sleep.

**OPTIONAL BONUS TIP # 2:**

If the prospect voices a challenge that is really a symptom, feel free to point out the underlying cause of this symptom. You want to help them dive deeper into, and better understand their problems. This is part of you being the doctor and accurately diagnosing the root cause of their problem. Often they think the problem is one thing, when in actuality it is something else. Here you are not necessarily solving the problem, but helping them to better understand the problem.

“A lot of the time, people think that this is about [symptom]. What we’ve found is that more often than not this is actually about [root cause].”

Or

“A lot of the time, people think that this is about [symptom]. What we’ve found is that it actually starts way back at [root cause].”

## STEP 6: SUMMARY & ROADMAP

DESIRED OUTCOMES:

1. Delivering the summary draws a close to the ‘exploration’ part of the conversation and ensures you’ve covered everything that needs to be covered, there’s nothing further that needs to be discussed other than getting them started.

This summary:

* Prevents objections from coming up later while you’re presenting the offer
* Test closes them on every aspect of the solution that you will present
* Teaches them how to think about their problems and what to look for in a solution, so that anything else they look at from a competitor just doesn’t seem right
* Teaches them how to think about their problems and what to look for in a solution, so that when you present the offer in Step 8 it is accepted as the perfect solution for them

1. Now that you know where they want to go, where they are, and what’s stopping them from getting there, you are able to outline a roadmap that bridges their gaps and helps them achieve their dream outcome.
2. This is a test-close that ensures you know exactly how to tailor your product or service to them in every way possible in Step 8. It should give them an “a-ha moment” by demonstrating that you fully understand their situation, what they want, and **how to get it**. Buying into this roadmap helps the prospect get very clear on the **cost of not** using your solution.

THINGS YOU DO AND SAY:

### 6.1 Summarise everything that they have shared with you, and what you have discussed so far. Really tell their story

1. **From Section 3:** Their history and current scenario, including the why us, why now. “You’ve reached out to us because…”
2. **From Section 4:** What they really **want** to achieve and the vision they hold. “The main thing you’re looking to achieve is…”
3. **From Section 5:** The current and most pressing roadblocks while reiterating the consequences. “And, what’s really holding you back is…”

### 6.2 Deliver their roadmap by applying the SSOFA framework to their top three problems or objectives.

The SSOFA framework is an empathetic and understanding approach to sales that's designed to make the potential client feel understood and reassured. It consists of these five elements:

**Situation:** Raise their number one challenge. Normalize the problem - help them understand it is common, this lets them know you have solved it before. Don't make the problem about the purchasing decision ie: "weren't sure what boat would best fit your lifestyle" but rather have it be about a problem they are currently experiencing because of the absence of owning a boat.

**Solution:** Walk them through what the actual solution to that problem is. Start this section with "The best solution to this" or "The best way to solve this is..." We are not yet closing into our product, just getting them to agree in principle to the solution.

**Outcome:** “So that you can finally… [outcome].” This should be the opposite of the problems in "Situation", meaning "Outcome" outlines the best possible desired outcome in response to the problems you've outlined in Situation

**Feeling:** “This is where you’re able to stop feeling [negative] and start feeling really [positive].” This should flow on from the problem, solution and outcomes covered in the previous sections.

**Agreement:** Do you **see** the difference this will make? How does that **sound**? How does that **feel**? Does that resonate?

**Advanced tip:** Agreement doesn’t just happen at the end of SSOFA, and communication is mostly non-verbal. Look for visual and auditory cues for micro-agreements, and gain explicit agreement for each solution once fully outlined. The key here is to utilise anything that comes up, don’t sweat if you suggest something that isn’t accepted, chunk up, utilise what they’re saying and continue.

**Tone and language:** Your SSOFA should be written with conversational, relatable and entrepreneurial language, not jargon or corporate-speak.

**Examples for different types of businesses and offerings:**

**Website Developer**

Situation (problem state): "So, our biggest challenge right now is that your current website doesn't mirror your brand well, and it's not generating the leads or enabling the sales that you're aiming for. That's a super common problem many of our clients face, so you're certainly not alone."

Solution: "The best way to solve this problem is by reengineering the website so that it not only presents really well for your brand, but it becomes a lead generation engine that fuels sales. A website that both reflects your brand, and turns traffic into customers."

Outcome: "Envision a year from now, you have a website that's a perfect echo of your brand and that's constantly working for you to generate leads and fuel sales."

Feeling - / +: "This will help you stop feeling like you're leaving money on the table and start to feel real real confidence that your website is helping fuel your businesses growth."

Agreement: "Can you see how big a difference this change could make? How does that sound to you? Is that the kind of outcome you're looking for?"

*Discuss agreement, then repeat for two other “Situations (problem states)”, to provide a Roadmap of 3 x SSOFA’s.*

**Boat Sales**

Situation (problem state): "You've shared that you're missing out on the relaxation and joy of being on the water because you don't currently own a boat. That's a feeling many of our clients have experienced, so you're definitely not alone."

Solution: "The most effective way to address this is to find you a boat that suits your lifestyle and how you want to spend time with your family. A boat that will give you that freedom and pleasure you're all seeking."

Outcome: "Imagine a year from now, you're spending your weekends out on the water, enjoying the peace and fun a boat brings, and it’s bringing your family closer."

Feeling - / +: "This will help you stop feeling like you're missing out on what the open water has to offer and start feeling the exhilaration and tranquility that comes with boat ownership."

Agreement: "Can you see how big a difference this change could make? Is that the kind of outcome you're dreaming of?"

*Discuss agreement, then repeat for two other “Situations (problem states)”, to provide a Roadmap of 3 x SSOFA’s.*

**Real Estate Agency**

Situation (problem state): "You've shared that your family is feeling cramped in your current two-bedroom apartment as your kids grow. It's a problem many of our clients face, so you're definitely not alone."

Solution: "The best way to solve this problem is by finding a spacious house in a family-friendly suburb. A home that offers your kids their own bedrooms, a backyard to play in, and is located in a great school district."

Outcome: "Imagine a year from now, you're settled into your new suburban home with plenty of space for your family to grow and thrive."

Feeling - / +: "This will help you stop feeling like you're constantly trying to manage in a space that's too small and start feeling the joy of having enough room for everyone to breathe and be themselves."

Agreement: "Can you see how big a difference this change could make? How does that sound to you? Is that the kind of outcome you're dreaming of?"

*Discuss agreement, then repeat for two other “Situations (problem states)”, to provide a Roadmap of 3 x SSOFA’s.*

**Digital Marketing Agency**

Situation (problem state): "You've mentioned that your online furniture business isn't attracting the volume or quality of leads you need to fuel your sales. It's a struggle many of our clients face, you're definitely not alone."

Solution: "The best way to solve this problem is by implementing a targeted digital marketing strategy. You need to focus on enhancing your online presence, improving your SEO and using strategic social media advertising to attract customers who are in the market for high-end home furniture."

Outcome: "Imagine a year from now, you have a steady stream of quality leads coming in. People who love high-end furniture, and are ready and eager to buy."

Feeling - / +: "This will help you move from feeling like you're constantly chasing sales to feeling confident that your business has a reliable stream of high-quality leads."

Agreement: "Can you see the impact this change could make on your business? How does that sound to you? Is that the kind of transformation you're looking for?"

*Discuss agreement, then repeat for two other “Situations (problem states)”, to provide a Roadmap of 3 x SSOFA’s.*

**Financial Advisor**

Situation (problem state): "You've shared that you're feeling uncertain and unprepared about your retirement plans. It's something that many people in your situation experience, so you're definitely not alone."

Solution: "The best way to solve this problem is by creating a detailed financial plan tailored to your specific goals and circumstances. A plan that maximizes your savings, optimizes your investments, and gives you a clear path to a comfortable retirement."

Outcome: "Imagine a year from now, you have a robust financial plan in place and you're making real progress towards your retirement goals."

Feeling - / +: "This will help you transition from feeling anxious about the future to feeling confident and secure knowing you have a plan."

Agreement: "Can you see how life-changing this plan could be? How does that sound to you? Is that the kind of security you're seeking for your future?"

*Discuss agreement, then repeat for two other “Situations (problem states)”, to provide a Roadmap of 3 x SSOFA’s.*

**Life Coach**

Situation (problem state): "You've expressed that you're feeling stuck in your current job and are unsure about the next steps in your career. That's a common struggle, and you're certainly not alone."

Solution: "The best way to solve this problem is through deep diving to uncover your strengths, passions, and ideal career path, so that you can create an action plan for where you’re going."

Outcome: "Picture yourself a year from now, feeling energized and fulfilled in a career that truly suits you."

Feeling - / +: "This will help you go from feeling stuck and uncertain, to feeling excited and clear about your career path."

Agreement: "Can you see how transformational this clarity could be? Is this the kind of positive shift you're hoping for in your career?"

*Discuss agreement, then repeat for two other “Situations (problem states)”, to provide a Roadmap of 3 x SSOFA’s.*

### 6.3 Gain buy in for the solutions and casually draw a close to the summary, transitioning to Step 8, ‘Unpack offer’

“How am I doin?”

“Have I missed anything?”

## STEP 7: TRANSITION - NEED CHAMPAGNE

DESIRED OUTCOMES:

1. To ensure their most acute away from motivation and toward motivation is front of mind before going into the Offer in Step 8.
2. To get them really associated with the biggest one or two roadblocks that will have the biggest payoff if solved, creating tension between where they are now and your solution. Solutions derive their value only from the problems they solve.
3. To get them excited about where they can be in the future once this plan is **implemented**.

THINGS YOU DO AND SAY:

### 7.1 Have them communicate all of the areas they need help, and the number one area they need help

“When it comes to implementing this roadmap, what do you think you need help with the most? Is it… [list all their problems]...?”

Ideally they respond: “Well, all of them!”

“For sure, all of them are important, but where do you feel you need the ***most help***?”

### 7.2 Pop the metaphorical-champagne. Have them fully imagine what best case scenario looks and feels like

“And 12 months from now [or whatever timeframe is most relevant for your product or service], just imagine we’re popping a bottle of champagne because you’ve achieved everything you wanted, what would have happened?”

### 7.3 Transition question

“Yes. I can see how important that is to you. Should we talk about the “how”?”

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## STEP 8: TAILOR THE OFFER

DESIRED OUTCOMES:

1. Now that you understand their logical and emotional buying motivators, what they want, where they are, their current roadblocks and have agreed on the Roadmap, walk them through the offer in a way that links the Roadmap to your Product or Service.
2. Get the “whelm” right, you don’t want to overwhelm or underwhelm.
3. Isolate the investment discussion, and reach resolution on **everything** else.

THINGS YOU DO AND SAY:

### 8.1 Three big problems

“Ok, so just to recap, it sounds like your three biggest problems are…

[Problem One]

[Problem Two]

[Problem Three]”

### 8.2 Three big problems into three big promises

“We work with [avatars] like you, all with one clear goal, [insert their champagne goal / main objective here].

The outcomes of what we do are, we help you:

[Go from challenge one, to achieving outcome one]

[Go from challenge two, to achieving outcome two]

[Go from challenge three, to achieving outcome three]

Does that make sense?”

### 8.3 Core Product / Service Pillars

“If I was you [name], and I was going to start a relationship with someone like [your company], I would need to have three things, write these across the top of your piece of paper…”

**[Product Pillar One]**

“Why do you think we find this so important?”

[Wait for response]

“Absolutely, right. This is where we achieve [OUTCOME 1]”

**[Product Pillar Two]**

“Why do you think this one is so important to our customers / clients / members?”

[Wait for response]

“Absolutely, and not only that, what they often find is this is how we help you achieve [OUTCOME 2]”

**[Product Pillar Three]**

“Why do you think we find this so important?”

[Wait for response]

“Absolutely, right. This is where we achieve [OUTCOME 3]”

### 8.5 Confirm understanding, agreement and isolate price

“Is there anything aside from investment that you are still unsure about… Is there anything you think you need that you wish we had more of or anything you think you don’t understand how it works?”

## STEP 9: GET STARTED

DESIRED OUTCOMES:

1. To present investment in a non-logical way
2. Future pace them to what happens once paperwork is taken care of
3. Get them started, do the paperwork, fire reassurance anchors

THINGS YOU DO AND SAY:

### 9.1 Present investment options

“There’s two ways people get started into [product / service]...

The first is… [product option or payment option one]

The second is… [product option or payment option one]”

If applicable, utilise the Price Presentation Framework in Step 6 of Selling Essentials.

Explain the benefit of both options. For example:

“The [second option] is for those who want to take care of it upfront, and get a saving, the [first option] is for those who want to bake it into their plan to make it nice and easy.

Which are you leaning more towards?

Great, so it’s [choice] is it?

Brilliant! Are you excited? :-)”

### 9.2 Fire reassurance anchors giving them visibility of what happens on the other side

“Too easy, so the process is almost complete. From here all we need to do is:

1. Complete a little bit of paperwork to get you started, and
2. Set you up for your [**instant** gratification thing ie: Welcome call, log ins, get the product sent] We only have space for a few of these each day so we need to get that locked in asap.

So, the first thing we’ll do is take care of a little bit of paperwork…”

[Walk them through your process of getting started]