

How we turn leads into appointments

All right guys, so in this video we're gonna talk about our process for turning leads into booked appointments, into sales calls.

Obviously, the more sales calls we have on our calendars, the more sales calls who show up, the more money we're gonna make inside of our business.

And one of the most important things that determines how much it costs us to get an appointment is how many of our leads were able to turn into appointments.

So many people spend so much money on ads getting so many leads, and only a tiny, tiny, tiny, tiny percentage of them end up becoming booked appointments.

Now, how do we actually do it? And the answer is simple. We do it with setters, right? This isn't an industry secret by any means.

More and more and more people have started to use setters because they know how powerful it is and how effective it is.

All the people I know for the most part who do eight figures use setters to do. So, setters are one of the most efficient ways.

And here's one of the things you have to understand. Appointments, books from setters are better, right? People who have like a VSL that books their appointments and they hop on a call with them, those leads is not where they're making the majority of their money.

For the people I know who are doing about eight figures or more, 80% plus of the money they make, even if they allow people to book to their calendars, is coming from the appointments.

Their set are set, even if it's a smaller amount of their appointments, just because they close at a way higher rate.

And the reason why is the pre-frame is so much better, right? The same way a referral, like if someone refers someone to you, they're gonna close at a higher rate.

And a, a center's kind of like that. They're calling a lead and they're preframing that lead, right? They're building all the beliefs, they're asking questions.

They're almost taking them through a mini close call before they ever talk to you. And then in between that they're watching a full sales presentation.

That's a one to many webinar that gets 'em excited about your opportunity. So setter just way, way, way higher quality appointments, way more trust after multiple conversations, there's the whole cliché thing. It takes seven contacts to close the deal. And one of the things with setters, it builds in more contacts before a sales presented, cuz a setter's not even selling them anything, so they don't feel like you called them and you just sold him something.

It's a two call close, right? The first call, you build a gap internally of where they at and where they want to be.

And you offer them a solution that's free. And that free solution is you give 'em the, the pre-call video and you give 'em the call with one of your closers, right?

So there's way more trust going into the call, way higher pre-frame. You have way more knowledge about the prospect going into the call because of the set of notes, right?

You can get them to watch the entire pre-call video prior to the close call. So they're showing up, they're pre-framed, they trust you more that you already, you know, there's reciprocity bias because you've given them something, you gave them a free video and you gave them the consulting call and you didn't try to sell 'em on that first call.

And guess what? You can qualify the leads. Like how many times have you had someone book on your calendar and you're super excited, you're juiced up for this sales call and you get on and they have zero interest in what you're doing.

They're just shopping around, they can't afford what you're buying. They're, they're just a horrible lead. And you're like, Dan, I just wasted an hour long time slot and I thought I was gonna close this lead, but even if I was the best closer in the world, there is no way I'm closing this guy, right?

He's, he's a tire kicker who wants nothing to do with what I'm selling. He was just shopping around and he's just, just a horrible lead, horrible, horrible lead.

Like hate to say a lead's horrible. But there's some horrible leads that we've all probably talked to in the past.

And what set allows you to do is get past those leads really quickly cuz they call 'em, they find out they're a horrible lead and they don't pass them onto you, right?

They don't pass 'em onto the CLO closer. And then lastly, appointments booked with setters have higher show rates. Typically, if someone books directly to a calendar, you're gonna have up to a 60% no-show rate.

But if someone books through a setter, you're gonna have a much higher set or much higher show rate.

And with our process, you're gonna have an even higher show rate on top of that, which we will talk about here in one of the next videos or so.

But for all these reasons personally, we don't even let someone book on a closer's calendar without first talking to a setter.

So if you let someone book to your calendar directly from a vsl, we recommend have them talk to a setter first and the setter will book them to a closer, right?

That's what we do because we've just found the leads who just book directly are the worst leads. They don't have the right preframe, but the longest sales calls, they refund at a higher rate.

They don't have the same level of trust. They want to do more research, they want to think about it. But when we have a someone, when we have a setter call the lead and then they do all the qualifying, they get all the pre-frame, they do all the selling leading up into it.

They give them a free training, which is the pre-call video before the call. They watch the pre-call video, they show up, you already know so much about them, you already know which path to go down as a closer.

It is really, really, really easy to close that deal. And that's why we recommend all your appointments should come from setters.

Is it slightly more operationally complex? Cuz you gotta hire a set team. Yes. But guess what? It is absolutely worth it, right?

There's no way around it. You need setters if you're doing a client-based business, period, end of story, right? And also high level setters, like you should be hiring setters who are like closers, which we'll talk about more later.

But they are the front lines of your business. Don't think of it as they're setting appointments for you. Think of it as a two-part close.

The setter is the first part of the close. The closer is the second part of the close. In some case scenarios, which we'll talk about.

You can do both parts, but you want a two-part close. Or the first part of the clo call is the set call.

Then they watch the pre-call video, and then they go on the close call. And when they have those three things, it is so much easier to close the deal, right?

You're not trying to move this giant mountain in one, you know, push. You're slowly, slowly pushing, pushing, pushing, pushing till it falls off the edge.

And it's so much easier when you're just doing one thing at a time to create all the beliefs you need to create in order for them to buy.

But when you get on a call and you're trying to make someone make a high ticket decision the very first time they've ever talked to you or heard about you, and you're like, why do they need to think about it? It's because they, they need to think about it like they just met you guys. They don't know anything about your business.

They don't know, They're not sold on the opportunity. They don't know if they trust you yet. But when they talk to a setter who makes 'em feel heard and understood and understands where they're at and where they want to go, and all the problems in between, and it's like, Hey, I have a solution for you.

Let me get you this free resource. There's reciprocity. They, they trust you and also free call with one of our executive consultants to really help you with X, Y, Z problem.

And then they watch the pre-call video and it helps 'em understand who you guys are as a company that builds the credibility, that builds the authority.

And then after that, what happens is then it under explains the opportunity. So simply they understand it and with stories and they see testimonials and they're like, holy smokes, you guys really know how to get people results.

And you tease your offer and they're like, man, that sounds really good, but that sounds, it's gonna be really expensive.

And then you talk about how awesome your executive consultants are and blah, blah, blah, blah, blah.

And then they show up to a close call and you already know everything about them.

You know, their, their biggest pains, their biggest problems, their biggest desires, the things they tried in the past that haven't worked because the set relays them to you.

And then you have a close call. I'm gonna tell you what, it's a lot easier to close that deal. Not only do you have an unfair advantage, but they're also way more excited on top of that.

It just makes it way easier. And so that is our, our system for turning leads into appointments that will kind of break down is setters, right?

We use setters telling you right now, if you're six figures trying to get to seven figures, you need setters. If you're at seven figures trying to get to eight figures, you need setters.

If you're already doing eight figures and you don't have setters, how did you do it? First off, second of all, you need setters.

You're gonna make a ton more money if you just implement this. We've seen people literally triple what they're making off the same lead flow just by adding setters.

So setter, setter, setters, I'm gonna say it again. Setter, setter, setter, setter, setters. That is gonna be a major focus for you guys when it comes to getting appointments on the calendar that are actually going to close.

Which at the end of the day, that's our goal, right?

Your first setter

All right guys, in this video we're gonna talk about your first setter. Now, in the beginning, here's really the question, should you self set or should you hire a setter?

Most people going into it, what they do when it comes to a setter is they hire some overseas person for three bucks an hour and they're like, oh, they're gonna set me appointments.

But really, again, like I said, setting isn't some like, dang, you throw to the aside and don't really think about it is one of the most important parts of your entire business, like how your leads, number one, how many get on your calendar and how pre-framed and how well vetted they are and how well persuaded they are makes a massive difference in terms of what your close rate's gonna be, in terms of how many appointments you're able to set from the leads that you paid for.

Like the biggest mistake people make is just thinking of setters as a side thing to generate some extra revenue and they just kind of do it on the side.

Like setters are like the core of your business if you really think about it. They're the front lines of your business and you need to treat it as such.

So with that in mind, we highly, highly recommend starting out self setting until you perfect the self, the the set script process.

And the reason why is cuz no one knows your business better than you do. There's a reason why people get on calls and they feel like, man, no closer can ever replace me.

I'm the best at what I do. And with that, with that said, it's the same thing with setting. A lot of times you are gonna be the best setter that your company will ever have.

And so for that reason, taking the time to be on set calls and whether it's you or a business partner and actually taking the time to perfect that process and figure out what you need to do to tweak the process for your business and what you sell makes a massive, massive difference.

We have some clients, and this was probably six months ago, they're like, all right, how do we hire our first set?

We're like, just take the set calls your yourself first. And they had a little bit of pushback at first. We're like, trust us, the amount you'll improve the process and the amount that you'll be able to tweak things and get them right is going to be absolutely crazy.

And if a setter comes in, they're just not gonna be able to do that in the same way that you are.

And so six months later they are have a set script that's completely different than what they started with and it's really, really efficient now.

And then just with one setter on field, just them on field, they're able to do like 30 k a month off of very, very, very, very minimal lead flow.

And now they're, they're scaling again, it's scaling is one of those things where it's literally just a decision to spend more money.

But that being said in the beginning, if it's, if you're small or you're under let's say 50 K a month, I highly recommend you do the setting yourself to really tweak that script.

And for those of you who are much bigger, maybe you're doing seven, eight figures, don't hire some low level rep to figure it out.

Like put one of your best guys on it and have them master the process before you start putting other people in that position.

Right? You don't want to hire setters into an unproven system. This is one of the biggest mistakes I see is there's no clear set process and you start hiring these low level reps and you're like, man, they're not performing.

And it's like, huh, I wonder why There's no proven process and you're hiring low level guys for the position. And here's the biggest thing too.

There's too many variables. Like it's hard to know, is it, is it not working because the setter I hired isn't good or is it not working because the, the script and the process that I have right now isn't good.

Versus when You have have a proven process, cuz you are one of your best guys, like PR proved it and like got the process working, you know, hey, this set process works, we've done it, we've seen it, and so therefore it's the rep, but we replaced the rep.

But when there's two variables, it's hard to know, which is, you know, the easiest one or the which one is the one causing the issue.

And the fastest way to lose good talent is by hiring people into an unproven system. You hire someone and there there's no clear system and you're just giving them something that doesn't work and they're not good enough to innovate on top of it and solve it like you would be able to as the business owner or if your best rep would be able to, if you're bigger, it it, it'll just get rid of talent.

Like people who could be really good, who have a lot of potential, it, they're not making enough money out the gate and so they just feel like it's not working and there's no clear road for them to fix it so they leave.

And that's the last thing we want. Again, we want to have a really good system that does 90% of the heavy lifting for people and they come in and they're the extra 10%.

We don't want it the other way around, right? The man who chases two rabbits catches none, right? So you wanna first figure out the set process and then figure, figure out the hiring, training and managing process.

You don't wanna be figuring out both at once. You want a process for people to come into that, you know, works that you've proved works and they come into it and it's cake.

You don't want it to be like you're trying to hire people and manage people. And then you're also have no clue what the sales process is and you're trying to figure out both at once.

And then you figure out neither, like I said, whatever's at the top of your triage list, prioritize that one thing and master that one thing.

And once that one thing is dialed in, move to the next thing, right? The man who catches two rabbits, ch a man who cha chases two rabbits, catches nothing.

I really want you guys to take that to heart when it comes to hiring your sales team. So we're not hiring your sales team when it comes to your set process.

And really, if you can be your first setter, even if it sucks, even if you don't wanna be on phones, even if you're resistant to it, do it anyways.

Right? Part of triaging and doing what's best to move the needle has zero to do with what you want to do.

I do things they don't wanna do all the time, right? Caleb does things doesn't wanna do all the time. The people in our company who are in leadership positions do things they don't wanna do every single day.

And if you wanna get to six figures, seven figures, eight figures, nine figures, and you're not there yet, you're gonna have to do things you don't wanna do, right?

So if you think it's the best thing to do, you're gonna hop on phones yourself. Or if you already have a really, really good sales rep who's taking your close calls, have them take some of the set calls and master that script for you.

If you're, you know, a much bigger level. But if you're under 50 K a month, even if you're under a hundred k month, truthfully, I take the set calls myself, master the process before outsourcing it.

Cause again, you're not gonna outsource something that is a broken system, right? You're just not gonna do it. So self setting, if you're gonna do the self setting yourself, we'll talk about this.

The script's gonna change just a little bit. Super simple as you're going through this, we're gonna adapt the, the set script for that.

And we're gonna do is set up in a hundred percent of your spare time, right? So block off everything else that doesn't matter.

And outside of the time you're taking close calls or doing fulfillment, you're gonna be setting right? You're gonna be setting and mastering that process.

Even if you don't want to, even if it sucks, you're gonna do it the best attitude ever. You're not gonna surgrudge through it.

You're gonna say, Hey, I'm gonna master this and I only have to to master this one time and I only have to prove this system one time.

And if I do that, then I can replace myself in this position and I already know the system works. So if it's not working, I know it's the rep and I can replace them, right?

And once you have a good setter crushing and then a second good set of crushing, then a third good setter crushing, you're gonna be absolutely killing it.

Like one or two good setters can get you to, can get you to seven figures, right? One or two good setters can get you to seven figures.

So do it until you get the process working. Then replace yourself. The goal is to get proof of concept. The math working not to make a ton of money.

It's okay if you're not setting the maximum amount of appointments. You're like, man, someone else can be setting full-time. I should just have them do it.

Cause then it's not my focus. You're not trying to make a ton of money from setting out the gate. All you're trying to do is get proof of concept.

Like the, the math behind the lead. Efficiency is all that matters, right? Alright, every 10 leads I get, how many am I able to speak to and what's my set rate?

What? And then you're gonna tweak that until you get the math really good. And then from there it's like, all right, now I know someone's doing this full-time and this is their full-time thing and they can get close to these numbers.

We're in a really good spot as a company cuz they're setting three appointments a day or five appointments a day and three appointments a day times 30 days outta the month, right?

That's 90 appointments a month. If I'm closing only 10% of those at 10 k, we're doing a million dollars a year.

So that is the content that we're going for, right? We just wanna get the proof. That's all that we're fighting for.

I don't care if you say you don't have time for this, I don't care if you don't want to be on calls, I don't care if you don't like it, do it anyways guys.

I've been there. There's a lot of things we all do that we don't want to do. But what we do wanna do is we wanna get to the goal and that's all that matters.

So we don't factor into our triage list. What we wanna do or what we like doing. We factor in what is the most needle moving thing we can do.

And for so many you self setting is gonna be needle moving cuz you're gonna master the process to where you can actually outsource it and you're not hiring like setters into an unproven process.

So that is the goal of what we're gonna be doing. Again, this is just high level overview. We'll get into actually how to do this.

The setting process, which Landon will cover really, really in depth. And dude, Landon knows this process, like the back of his hand.

He's managed literally hundreds of setters and trained them up on this process. And we know this works a hundred percent for a fact.

Like this is a proven process. Imitate, before you innovate, just listen to exactly what he says. And I promise you, if you guys get to even a fraction of where it Landon is at with this process, you guys are gonna be absolutely crushing it.

You're at six figures, you're gonna be at seven. If you're at seven, you're gonna be at eight, and so on and so forth.

Our setter process & how it eliminates no shows

All right guys, in this video we are gonna be talking about the one setting. So p that eliminates no-show that eliminated no-show for us.

This is one of the most important setting SOPs. Like if you're doing setters, this is one of the most important aspects.

It makes it to where even not so great setters can get really, really, really high show up rates on those calls.

And if you've been in the industry for really any amount of time and you've been booking sales calls, you know the pain of spending all this money, getting leads on the calendar, getting appointments booked on the calendar, setting up all these sales calls, and usually 60 to or 50 to 60% of people usually nohow. It is one of the worst feelings you can have and everybody in the industry deals with it. We've tried everything to get it to work and nothing worked until this.

And really the issue with it is not only do you have half the appointments, but obviously you're gonna spend twice as much on ads, right?

It'll increase your ad costs by a hundred percent because if you're paying for, let's say a hundred appointments and only 50 of them show up, then it means you're really only paying for 50 appointments. So if we can get a hundred to show up from the same amount of ad spend, it cuts our ad spend in half. It allows us to be twice as efficient with the leads that we have. And also you need half as many salespeople to scale to whatever number you're trying to scale to, which is a massive, massive, massive thing.

Efficiency makes everything easier. If you're efficient, scaling is less operationally complex. Scaling your sales team is exponentially easier cause you have a smaller team of really, really good guys rather than a larger team of people just desperately trying to put leads on the calendar.

Also, the other big thing too is currently not only is it cutting your ads or you're spending more on ads and stuff like that, but also if you implement this, your revenue just immediately double.

So if we can fix this, I think we can all agree it would be a massive, massive win. And like I said, we've tried everything to fix it.

Up until this point, we tried every email sequence, every tech sequence. We tried charging for calls, meaning we would literally make people pay to schedule an appointment with us cuz it got to a place where this is just such an annoying problem where all of our calls were just no showing.

And I know a lot of our friends in the industry felt the exact same way and have tried similar things.

And the issue was this was, yes, those appointments showed up, but it resulted in way less appointments because obviously when you're charging a hundred dollars to hop on a call that people are usually reluctant to hop on to begin with.

A lot less people wanna hop on that call. So even with really talented setters on the phone trying to close people on it, it was an uphill battle.

Our best setters struggle with it. So that did not work at all. The appointment showed up, it solved the problem, but it created a much bigger one, which was our cost per lead went up by not a hundred percent, but by hundreds of percents for the short time that we tested doing that.

And also revenue dropped cause we just didn't have the same amount of opportunity on the calendar.

Like I said, everyone in the industry struggles with this.

We even did a mastermind. Dean was struggling with the same thing. Him and his sales team were just getting blown up by no-show.

And one of the, he just basically called a mastermind. He's like, all right, let's get everyone together in the industry and let's see who's got what and see if we can solve this.

And so we got everyone together, we got all of our eight figure friends. Dean invited a bunch of his eight figure friends.

Tony's team was there, Cole Orden was there, like all these people in the industry were there. And we were going around basically saying, Hey, what what's everyone doing for no shows?

And guess what, no one had a good solution. People were canceling appointments off the calendar doing like appointment grading, but the issue is you're deleting 70% of your appointments off the board.

Other people were doing really, really complex things to get people to verify their appointments and like confirm that they were gonna be there and they would cancel the ones that didn't.

But the issue is that just increased lead costs dramatically. But again, it's such a huge problem and it, it makes it to where your team has to be so much bigger that people were willing to do it just to get calendar people to show up for those calls.

So yeah, literally nothing worked. Like I said, like it was just, it's just the biggest nightmare in any business if you're in this space.

You have to understand that it's not about how many appointments you put up on the board, it's how many show, right?

So it's like, don't, don't look at your, oh, I had six appointments last month. It's like, no. How many people do you actually show up and talk to the calls and talk to on calls?

And that's the metric that matters. And really the goal is to get as close as we possibly can to a 100% show up rate without increasing the cost per appointment or affecting close rate, right?

So that's really the goal. We, we were optimizing for when we were trying to solve this problem was get as close as humanly possible to a hundred percent of calendar slots being filled up and actually showing up for sales calls without increasing our cost per appointment.

Cuz all the methods that people were using and that were working and we kind of did this mastermind, well, they weren't really working because they were just dramatically driving up lead cost, which is just not efficient.

And the more efficient our machine is, the easier it is to scale. So this was our mission. We were trying to solve this and what our team came up with after tons of time, trial and error, tons of frustration, tons of failed ideas, tons of, you know, stupid ideas, truthfully was this.

And this was the magic bullet. Literally the magic bullet that once we implemented absolutely changed everything for us. We implemented a hundred dollars cancellation fee, which obviously that's gonna decrease no-show rate.

But the real key is how we implemented it in a friction free process where literally it didn't hurt our cost per lead.

We got literally 99% almost no one objects to the way we do the cancellation fee. So we had the same amount of appointments being put on the board, but now every single one of them agreed to a hundred dollars cancellation fee if they didn't show up, if they showed up at a distracted environment or if they didn't watch the pre-call video.

And I'm sure you guys can imagine how dramatic would effect that ha would have if you guys could get everyone to agree to that a hundred dollars cancellation fee without hurting conversions.

So later on we'll talk about how we actually pull it off and what what we say in the script to accomplish that.

But the big thing is we literally went from having a 50% no-show rate to as high as 95% when set are actually executing.

Like when setters execute this the right way, we have basically every single appointment show up. And really the only time we ever struggle with no-show problems when we got rogue setters who think they have some better genius idea and we find out they're not implementing this cuz you know, they don't like the way it feels or You know, they're doing it really softly or they're not following the script the right way, the way that actually works, and again, when his setters historically have not done it, they're no show rate plummets.

Like there's been weeks where we're crushing it, we're crushing it, we're crushing it, and all of a sudden no show rate starts to climb up again.

And we're like, yo, what's going on? And we dive back into calls and we start noticing setters aren't following the process for this, right?

So you not only have to have this, but you have to hold your setters accountable to it. You have to keep telling 'em how important it is cuz so many people think, oh, I got a better way of doing this, right?

They got so many limiting beliefs that, oh, I don't wanna do the cancellation fee. I have this, I'm really good on set calls and I get people really excited and bought in and they're gonna show up so I don't need to, I don't need to do the cancellation fee on this call.

And that's what starts happening when the no-show rate starts going up, right? So I'm telling you guys from experience, I don't care if you're doing seven figures, eight figures, nine figures, or if you're doing a

billion dollars a year, like if you have appointments booked on your calendar and that's how you generate revenue, you do a cancellation fee on every single call and you do it following our process to a t to get them to agree to it and to double confirm, triple confirm that they're okay with that so that they show up to that call 100% prepared, ready to go.

It's important and you should not skip it. I don't care what the excuse is, right? I don't care if you don't like it, I don't care if you don't think it helps.

I don't care if it feels uncomfortable and I can't tell you how many times people are like, okay, I'll, I'll, I'll do the setting process.

And I call 'em like, yo, what's your no-show rate? And they're like, oh, it's about 50% and I'm like, 50%.

That doesn't make any sense. Are you doing the cancellation? Be like, yeah, I'm, I'm doing the cancellation fee. And in reality they're doing it on like one or two calls here and there.

But for the most part, whenever a lead feels like they're gonna show up, they're like, oh, I'm just not gonna say it.

I don't wanna, I don't wanna risk the deal, right? That's a lot of times when people feel like they, they're so afraid of risking the deal that they don't do the cancellation fee and they don't follow the process of buttoning it, buttoning it down.

And what happens is that call that was so fired up that you feel like is gonna close and you didn't wanna mess it up, it doesn't even show up and you don't even have the opportunity to close it.

So I don't know if I can emphasize it anymore. Cancellation fee. This right here. If you were, if you're doing seven figures right now, if you're doing a million dollars, let's say you're doing a hundred k a month and you have a 50% nosha rate, you will instantly almost be at 200 k a month just by implementing this one thing.

If you're doing a million dollars a month, you will instantly almost be at \$2 million a month just by doing this one thing.

Like it is absolutely game changer. Your best closers will have double the opportunity that they currently have. It is 100% mandatory.

Like anyone who who comes to me and we're they're asking for advice here and there and I find out you're not doing cancellation fee, I'm gonna be p****d, right?

Like I'm telling you guys, you have to implement this one piece. It works. Everyone we've told to do it works.

I remember we told Cole to do it with his sales team and literally, I kid you not, the next day we were walking in in Scottsdale and he, we ran into him and he runs over to see, guys, you won't believe this. Our no-show rate went from I think like 50% all looked 80% the first day we, I the first like week we implemented it.

So it works every single time 100% of the time Without fail that we've had some implement implemented to date it has worked and I promise you it will work going forward.

We've proven this across literally tens of thousands of calls. So commit to doing it, you're gonna make literally 30 to 40%, 50% more all of profit off the current leave flow that you have without increasing ad spend, without getting more leads.

And also truthfully, if you have a smaller close team right now, you might have to lower ad spend until you could hire somebody new in order to be able to actually fulfill on all those sales calls cause of how many you'll be having.

Setting up tech

Hey, what's going on everybody? So today we're gonna go ahead and talk about some of the systems that we use to not only get our set calls booked what the setters use to use as like a dialer which is Max of course.

And then also in addition to that, some of the automations that we set up to help people kind of go through the flow.

Once that call is booked, the text message we send out and just how we bundle all that together. So we use a platform called Go High Level.

The reason we use go high level is because everything is packed into one platform, we have two-way text messaging, email we have automation, so, and then we have a calendar booking, we have an opportunity pipeline play a central place for contacts.

You can also host a course on here and, and a ton of other things as well. So the primary thing that we use is when our settlers go to book a call, they go to the calendar, and again, this calendar is hosted on go high level.

They come in here, right? They select a date. Obviously, you know, I'm sure you have learned this by now, but I'll reiterate here.

We only allow 48 hours to book out 48 hours. And the reason we do that is we don't want people to lose buyer's intent by any means.

So you can never book same day. The statistically likelihood of that call being missed same day booking is almost a hundred percent from our experience.

So we never allow same day bookings. We only allow the next two days. So right now people can only book for Thursday and Friday, right?

So when you're on here, all you can do is just come in here, kind of select a time, go in here, and then for the form that we use, you know, we just use this.

Let's kind of come in here and just add in some random stuff. I wanna see that email av, okay? And then kind of just go through this here And then we're gonna schedule out.

Okay, so that's been scheduled. Again, the customer does not see this at all. The Setter is one who sees all this and books a call for them, everything like that.

So that setter is also going to get a text message. Now, if you go here, now the setter is gonna get a text message that says, Hey, close their name for Jared is Jared.

Of course that's me. And then you can click that. This is meant to go to a blank page that isn't working.

So that way we register that trigger, click over here. So if I ever hit refresh on this page, you'll see it here in just a second.

That that was clicked and it was confirmed. So now our appointment over here has been confirmed from January 19th and all of that good stuff.

It's Ron, Robin calendar, all of that. Obviously you can set up your custom field lead status. We can kind of go on that in general here in a second.

Right here I'll show you kind of, as you can see, They're now in the closer call confirmation and reminder.

So in here, this is our workflow, right?

So we have all these different triggers and then we kind of split 'em off depending on who they're assigned to.

It'll go through all this. We'll update all their information and data here. And again, this is just our workflow, however you guys decide to you know, do this is is completely up to you.

But again, I love the workflow builder here in go high level, there's tons of things you can do with it. And again, just based on that one form fill out, we can update a ton of information. So obviously we send all this data to a spreadsheet via web hooks.

And then of course here I am sitting in this three minute wait before I get sent my confirmation email we wait another minute.

We send 'em all of our other text messages and emails here, pre-call, video links, all of that good stuff, notify the lead owner and then, you know, 24 hours before the appointment, we're just gonna sit here and we're gonna wait.

Okay? And again, as you can see, if they haven't watched the pre-call video based on our tags, they're gonna go here.

They're gonna get kind of these text messages. And then kind of when we were, you know, doing some other stuff as well we were split testing some things.

So I had to branching off and split testing some videos here and obviously can't see statistics cuz this is just in my test account where I test things first before I actually launch them to the main platform that we use.

That way again, I know that they work and then one hour before the appointment, everything kind of funnels here one hour before the appointment, then they get the last text message and email there as well.

So that's kind of how our, you know, appointment booking works, the appointment reminders work and really same thing for a lot of other things too, right?

If you go to our workflow as we have closer automations, we have finished our automations you know, and I'd really try to, we have onboarding workflows as well.

And I really try to have folders to really separate and keep things organized for your systems and operations and backend stuff.

So that way you know, a matter of this appointment gets booked and a lot of this stuff just happens automatically, right?

So again, that is kind how we book appointments, that's how we set them up on here. When it comes to your calendars on go high level you can access them as a couple different ways, but you can come in here and go to calendar settings here.

What we like to do is we like to come in here and we like to create a group. For example, we have closers that's our closers group.

Admissions counselors is our finishers group. And then we have our onboarding specialist, right? And you can see the calendars that are assigned there, right there.

And then if you go here, these are the individual calendars that are underneath the group setting, right? Cause you can filter that here.

And if you go to group and you go to closers and apply now you'll see this is the calendar right here, right?

So it's a, under that group the duration is 60 minutes to round robin active date. Last updated was today. Okay?

I come in here, you can obviously duplicate this, you can copy the embed code, I can deactivate the calendar, you can move to another group, you can delete the calendar.

Then copy the leg legacy edition link or all these other links too. They're all the same thing. And then if you go in here and just edit this, I'll kind of show you how we lay this out.

So when you come in here, you can, you know, optimize for availability. You could, you could do this and just leave everybody on medium priority.

But ideally you just do optimize for equal distribution, especially if you keep adding people here. That's how, that is the best way to go about that.

Then you have a name of it. I always like to add the time zones here. Go high levels, time zones do change.

So we are in standard time right now, so that's why everything's E S T P S T M S T C S T, whatever that may be.

But when we go to daylight savings time, this will go to E D T C D T, you know, cuz again, eastern daylight time, central daylight time, mountain daylight time the time zones will change with that.

For example, lemme just show you, as you can see I am in the PST right now. So you can come in here and you can do m m s t, search it obviously Arizona.

You can also compare the time. Again, I'm an hour behind Arizona time right now and as you can see it's 11:23 AM where I'm at 1223 there.

So if I'm booking for a client, I'm just gonna go ahead and verify, hey, what time is it there for you right now?

Or what time zone are you in? And go from there. So just something quick and easy. And then of course you have the, you know, URL here that you can adjust and change to.

So you can, this could just be, you know, executive consultant just like that. This, you don't really have to worry about it, you leave it on Neil.

And then we'd like to do this, you know, contact name dash executive consultant. That's what they're gonna see on that calendar invite and on their calendar.

And then you click save and it's gonna move you on to the next one. We'll do an hour long duration.

Preferably what you would do is just do the hour interval so they book at the top of the hour so they can only book at 8:00 AM 9:00 AM 10:00 AM 11:00 AM et cetera.

And this is also what I mean here by the camp book. Same day. You need to put this on 12 hours rolling notice because if you do one day it will block off.

So today's Wednesday at 11:24 AM it will block off the whole next day of Thursday. So you won't, the only day that'll show up is Friday.

And we can, I'll show you that example here in just a second. And then the date range is three days.

Okay? Again, if we can't book the same day, it allows for two days then. And so then we're only booking for the next 48 hours on Friday.

On Friday you need to make this four days. So you can actually book for Monday as well, cuz again, either some closes may not be available Saturday, Sunday and people may not be available on the weekend.

So then you can actually book for the Monday, which can also help pack out your Monday as well. This is again, just setting up your, your hours of when you want this calendar to go live.

5:00 AM to 9:00 PM Okay? And then you can just, just hit apply all. Or if we just do, let's say 6:00 AM hit apply all, it'll adjust all of them for you.

If you don't wanna do Saturday or Sunday under those boom boom. And then again you just hit apply all, it'll update those for you.

Click save, okay? Then it's gonna bring you to this this is the custom form that we use personally. So we use a closer again, that's just a custom form that I made in the back end of go high level.

And then you can attach that form here. And then we do not let the calendar auto confirm the appointment. And the reason we don't do that is because we wanna send that text message to the setter first.

Say, Hey, here's your closer, here's their name and then we'll let them hit confirm. I have an automation set up to where if they don't hit that confirm and in 10 minutes we'll automatically confirm that for them that way.

Worst case scenario, we booked an appointment when it shouldn't have been booked rather than we didn't book an appointment when it should have been booked, right?

We'd rather have the scenario of an appointment being booked and having to cancel it than the appointment being thought it got booked and it didn't.

So it's a much better scenario. I allow cancellation and rescheduling, but I do not put that in the notes here and I do not allow that to be sent out.

The reason I allow it is because then I will send these to, so again, see how that pops up here. I will then come in here and I will just delete that so that way it cannot show up. And then I will send these links to our close or you know, whether to close or whether it's Max or whatever the system you are using. I'll actually send those links through Zer through a web hook to Zier and I'll put them in there so that way the setters can actually cancel that appointment or reschedule it based on just clicking those links rather than having to log into the backend of the system, try to go in there, cancel it or mess with anything like that.

Okay? And then I just do this and your booking yet it's been confirmed. Super simple. So we're gonna hit complete here.

And then I'm gonna go back up here and refresh this and I'll just kinda show you what I mean. So see what I mean by I did it by one day.

You can't even book Thursday. So that's why I do a rolling 12 hours. The rolling 12 hours will never ever let you book the same day.

But it will let you book that next day. But again, if you put it on one day minimum scheduling notice, it'll block out that whole next day for you and it will not work.

So that's why we do to 12 hours and we do not do the one day. So I know this video's getting long here. I'm gonna go ahead and start to wrap this up. So when it comes to the overall systems we use go high level.

And the reason we use go high level again is because it has so much built into one has our calendar system built into one, it has our, you know, you can call right out here, right?

You can click that, it's gonna start to dial out, okay? You can do live transfers in here. So if we just sit there and let that call out, as you can see, you can warm transfer, you can blind transfer, you can mute now, you can hold all these other things, you can just hang up, click done.

So again, this is what our finishers and closes and onboarding team usually uses. Onboarding will use a zoom count. But again, this is how we like to set up our systems because everything is encompassed in one place for us.

And just just really allows us to, you know, utilize one platform rather than having to, you know, use like once schedule once or Calendly and then connect that to Zapier and then have another text message email platform like active campaign that then sends out all of our text message point reminders and then we have another system that we make all of our calls out of or we just call off our cell phone, right?

We have one system, this is it. We do use Zier for a lot of other things of course. But again, the whole idea here is to simplify.

You want a high-touch system with one touch, right? You don't want a high-touch system with 30 different touches. For me as a sales rep closer, whatever it is, this system allows us to have an incredibly high touch system with the center of closer only having one or two touches on the back end.

But me as a customer feels high touch, right? So again, that's why we utilize this system. As you can see up here, we've white labeled this, you can white label it.

If you'd like to. Again, that's totally up to you. They have a base account for 99 bucks a month and you get all this.

And again, there's tons more. There's websites, there's funnels, reputation management, reporting marketing I mean like I said, the list goes on.

And opportunities here as well. We do add opportunities. So again, anytime an appointment is booked, we will add the opportunity here.

You can go there and then of course you can just kind of check this out calendar event. It'll actually show you the date and time of when I have that next call booked.

And then of course you can just drag and drop this person first call, no show or you can do not interested or whatever that may be.

You can click in here and you can update it as one, whatever that may be. But again, you can create as many automations and adjustments as you want in this platform.

The reason it just disappeared there by the way is cuz I have an automation to where if it goes to first call, no-show canceled, we actually market is lost.

And you'll see it right here as lost. So we did not interested. But again, that's what I talk about is automations.

I just dragged and dropped that automatically updated the opportunity for me. That's kind of what we're looking for. Again, one touch equals high-touch.

That's what this system creates for us and that's what you guys need to create when you're building out your systems or thinking about how you're building out your systems and simplifying it.

The biggest mistake I personally see people make when it comes to their sales systems is they have 10 different platforms that they're using.

They're sending all their data through Zapier or make.com or whatever it is. And when there's an issue, it's not as a matter of like digging into one platform.

You usually have to dig into almost all 10 platforms depending on the issue you're facing in here. When there's an issue, I just come down here and I hit view audit logs, I can see everything that happens, workflow, updated workflow, updated view details.

I can see what was updated, right? So again, that's why we use this system. The more data we keep within one system, the less we have to look in 10 different places to see what happened.

Where did things go wrong? E, tc. So again, we highly recommend go high level, we use it ourselves. It's what all of our systems are built out on.

Whether it, you know, anytime you have a close call scheduled if you're even watching this video, you have gone through our process that is built out on go high level period, right?

All those text messages, the calls, everything you get, it's on this platform. Nothing. But even now you're gonna get automations for your how We Daily Consulting call.

That's an automation built out in go high level that is constantly reminding you and saying, and it puts you in a loop and every day at that 5:00 PM MST mark, an hour before and 10 minutes before, I'm sending you that meeting link.

And so again, automation, high touch, OneTouch so again, just keep that in mind as you go through to build out your systems and how you construct those.

Again, I just kind of showed you how the calendar setup works for us, how we set up our appointment reminders and how you can call outbound here and go from there.

Go high level has a extremely extensive library on YouTube. There are videos everywhere on how to set up your automations truthfully.

Again, this video's getting long. I could go on for hours about this platform, the system, the things that we've built out.

But I just wanted to show you guys the baseline of what we do as far as setting up a calendar, getting it round robin to all your closers, sending out the appointment reminders and automations and just making sure that you're nurturing high-touch people with OneTouch on the back ends.

You're not stressing out your closers, your setters, whatever that may be, to where they feel like they have to do a million things just to get a deal closed, right?

Let the system do the work for you. 99% of the time people make mistakes, not systems. And that's why we implement systems like this.

Systems don't forget how to send reminders or forget to send reminder in general, right? People do. And so again, that's why we set up these systems in the backend automations, even the fail safe, if, if they don't click the confirm trigger it in 10 minutes, it'll automatically confirm it, adding fail safe and things like that to where even if there is human error, there's no error in the system.

So accounting for those things, thinking about those things and again, utilize the platform. It's here, it's built out for you to utilize.

So leverage it, use it like we do. And again, we have multitude of systems different companies, different offers built out on go high level.

And go from there. So again, as you're in here too, please just keep in mind. One thing I'll show you about go high level is they have a whole membership site as well.

So most of you watching this video are selling a high ticket course. So if you want to continue to consolidate your platforms and your systems, look into the products here offers, dashboards.

Again, they have it all. They have everything you guys need to get your business set up going or simplify your systems or bring all your systems into one platform.

Again, we use it for almost everything. So appreciate you guys again, feel free to reach out if there's any questions on this specifically, I'm here as a resource for you guys to utilize and, and answer questions to anything you guys need.

Let me know. But in the meantime, I'll see you guys in the next video.

Script Overview

Alrighty, I'm gonna be walking you through the entire appointment booking process, as well as some of the psychology, the different pieces, how this framework looks, and how to basically turn people from completely cold traffic, maybe a little bit warm traffic to people that are on your calendar, ready to be closed, and for you to collect cash on.

So basically there's four objectives of this call in this setting process. Very simply one, discover where the prospect is in their journey.

Figure out who they are, what they've been doing, what is their downfalls? Create some doubt in the prospect's ability to create change or provides some results.

Basically making it to the finish line and, and making them feel like they can't do it on their own. The third one, the most important, you're selling the consulting call as the solution, not the end product or the fulfillment.

Very important that you keep in mind. This call is all about getting them to the next call, not selling your product or the fulfillment that they will get from it.

And finally, get the prospect committed to the pre-call homework. So, let's go ahead, let's dive in section by section. I'll explain exactly why the pieces are laid out, exactly how they are, and give you this incomplete framework that you can input for your business.

Basically, copy, paste, place, all of your credibility, all of your company everything that you offer directly in the sections inside.

So, let's go ahead. Let's dive in.

Intro + Fit Check

All right, let's dive into the intro and fit check portion of the script, one of the most foundational and important pieces of the script.

You're gonna uncover basically the beginning driver and motivation of why these folks have actually opted in for more information. So very, very essential, very key and a very, very important piece of the call to execute correctly, to not only keep people on the phone with you but to begin to get into the discovery of the call.

So, very simple. It's a Hey name. Hey name. This is your name from company. I'm giving you a ring because it looks like you opted into one of our ads.

Looking for more information, they'll respond. Awesome. And by the way, name, this call is being recorded for the classic quality assurance purposes.

But I'm actually the manager over here on company's client success team. So I'm really just reaching out to make sure you get the most outta your current resource that you opted in for.

And also at the end of the day, we insert credibility. So we are really familiar with this process. So if I can just ask you a few questions, I may even be able to pair you with some more internal resources that may be valuable for you.

But I mean, first off, what piqued your interest and had you opt into company? So couple key things here. You're basically confirming that they actually opted in and they reached out asking you for the information that you have.

Put it this way, people are putting information on the internet without expecting something in return. So you are now returning that request.

Second piece here making sure that you're mentioning that your call is being recorded. If you're using call recording you have to make sure for obviously compliance reasons.

We're letting everybody know that the call is being recorded. And then you're moving into reason why, bias of why you're actually reaching out.

You're the manager or a manager of the success team over at your company. You're just reaching out to make sure that they get the most out of what they asked you for the resource that they asked and opt, opt in for.

And also, at the end of the day you need to insert some credibility here. So let's say for instance, you are a fitness company and you've worked with over 150 clients that have lost at least 20 pounds or whatever it may be.

You would basically have some that looks like this. And also at the end of the day, we have worked with over 150 clients that have lost at least 20 pounds.

So we are familiar with this process. So if I can just ask you a few questions, I may even be able to pair you with some more internal resources, X, Y, Z.

So you're giving a, a credibility stamp on why you're actually reaching out building value in what you have to say and what comes next.

And then finally, you're basically just asking them to equip you with the knowledge of why they're even here in the first place.

You know, what piqued your interest and had you opt in? Why are you on the internet searching for solutions and, and what is the problem you're trying to salute?

So, Very key, very formal and ultimately it's going to open up them to get into a discovery mode. So from here we're gonna jump into fit Check.

Now, ultimately the whole purpose of the fit check is to make sure you are on the phone with your ideal client.

People that are aligned with your core offer and what you have to sell, the fulfillment that you have and the product that you're actually gonna execute upon.

Making sure that all the people that you're on the phone with, in fact are aligned with that is very, very vital cuz you don't wanna be wasting time on the phone with people that have no intention to actually purchase what you have.

So this question in the next section where we actually fill out a mock script you'll see how this question looks, but essentially you're asking them if they have a core alignment with your product in the result that you produce.

So for instance, if it's a, again, fitness offer if you're selling coaching in the fitness space, basically it would be something, do you currently have a plan in place to lose weight?

Do you currently have a plan in place to, to gain weight muscle? What are you currently doing to actually do that?

So if they do have a plan in place or if they are actively working out or if they are actively on a diet plan moving into the next section, if not, we'll insert a context-based question to get them to actually commit that that is something that they're looking for.

Now again, we're gonna piece this in together in the next section where we actually build the script out and it'll make a lot more sense.

But just remember this is essentially a filter to figure out are these people aligned with your core offer and if not, and the call and find the next person that is aligned with your offer.

So next we're gonna cover the deciding the direction and get into the discovery of the call. So I will see you there.

Discovery / Gap

All right, so we just finished up the fit check. We now know that these are ideal clients. The people that are on the phone with you at this very moment are directly aligned with what you have to sell.

So now we're gonna actually move into the deciding direction and the discovery phase of the call. Now, very important, the deciding direction phase of the call is essentially getting a gauge or a temperature check of exactly where they're at currently before you really dive into their exact process or where, you know, they're actually standing right now in alignment to your offer.

So think of yourself as a metal detector that's scanning across them your prospect or their business or their routine whatever it is that they're they're doing, or the model of client that you're selling to.

You are the one that's taking that metal detector and basically just looking for a beep. You're looking for somewhere where they're struggling, where they're definitely out of tune, something that's out of place.

And those are your points of emphasis which will actually build your ammunition. And you can jump into the button down section of the call with a ton of ammunition and get them excited about getting onto the next call with your consultant.

So let's start this off. Let's jump in and walk through how this section looks, how it'll work. And then, like I said, as always, in the next section, we'll actually build this out so you guys can see it in action.

So what are you selling? What is your current routine? You know, what are you actually doing right now? Meaning, you know, what, what is the pricing?

What is your training regimen? What is, what is your eating, your diet? That kind of stuff. So basically you're, you want a 30,000 foot overview of exactly kind of where they're at right now.

To give you a good example, fitness is always a very good, easy example to place in here. So, you know, what is your current workout routine?

You know, meaning how many times are you in the gym per week and you know, what, what does it look like when it comes to that kind of stuff?

And they'll give you the answer. Got it. And how much weighter or have you lost so far? How much muscle have you put on so far?

Or if it's a consulting frame you know, how much money are you making right now? Basically this answer to the second question is directly tied into question one of the discovery which will actually be the flip and adverse of what their answer is.

So for instance, you know, how much training are you actually doing right now? And then question one, so are you seeing results?

And then it'll actually jump and dive right into the discovery where it's a series of, you know, 15 questions or so where you're actually digging into where they're at in their life and where they're at, you know, business wise or healthwise or whatever it is for your offer.

And you're getting all the context that you need. So question one, you'll ask them if no, it'll be two or three context questions that actually follow that up.

And this is a pain point. Write all of these pain points down. Second question, where do you want to be? So again, in the fitness aspect, if they are, you know, overweight and they wanna lose 40 pounds, and they tell you, you know, I wanna be 40 pounds lighter, write down the gap, where are they now?

And where do they want to be? You're gonna use this later in the call, and it's very, very important that you have this question.

Number three, one of the most vital and most important questions. Now, I'll tell you this play around with where this is placed inside the framework here.

You can have it as question three. I mean, you can move it to question 4, 5, 6, 7, but keep this early inside the call because it is vital to make sure that the people you're talking to now that you have funding through Midas you can actually push them through Midas and collect cash from them and making sure that everyone that you talk to is actually qualified to work with your business early in the call.

So you're not wasting 20 minutes every time you're on the phone with somebody is very, very, very vital. So let's walk through this.

There's very, very simple word track that goes along with this. And it'll, you'll see how it kind of ties in and doesn't seem as like a blatant ask of, of information.

So let's walk through. Now, obviously a big thing that determines what direction company can point you in is the available capital that you have, because obviously that does affect the route a business or individual can take a pretty solid amount.

So kind of gimme some context and an idea for you. An easy way to ask this is if you had hypothetically and ad campaign or a workout routine or a meal plan that you knew with certainty would produce a two to three x return or an ideal result, but you wouldn't see that return for a month or two, how much would you currently be financially capable of putting into that process?

You know, factoring in liquid capital, available credit, et cetera. And then make sure obviously you have a bare minimum qualification.

You know, what you can push through funding all things that we'll work on together as well. So cool. So they let you know how much they have.

Got it. And then for context on what type of funding you could possibly get for marketing or these exercise plans or equipment, whatever it may be in other high leverage points for a business or individual, what is your TransUnion credit score specifically?

Now, this is very important. The psychology behind this is essentially you want them to give you a specific credit score.

Ranges do not work. I will tell you, 95% of people that give us a range inside of our company, it's very off. Every person, for the most part in America for sure knows their credit score. They look at it a lot. So it's just a matter of leveraging this question in the correct sense.

We use a model where it's plus 700 on their credit, but if they don't know what their credit is, have them check their credit card app.

Almost every credit card app has a credit score feature inside of it. Or send them this link that is embedded into the script.

Have them fill it out and let you know the number. Now, don't let them check Credit Karma. Credit Karma is very, very inconsistent and it's only gonna lead to you missing more deals because they actually can't get funded cuz their credit was off versus what they told you.

So you've asked them what their credit score is, specifically if they ask you why does this matter? We have a word track that will follow that up that converts at a very high level.

You know, one of the biggest challenges we see holding back individuals or businesses we consult is their ability to secure funding for capital and things like resources, you name it, we've just seen it affect the results rate and credit score just happens to be the best indicator of what your potential for that is.

And definitely influences the game plan. We're gonna give our clients for outcome. That's why we ask. Now typically that'll turn people and they're gonna let you know.

All right, got it. That makes a lot of sense. My credit score is x, y, z. Cool. So now you're moving in, you have your credit score onto income, okay?

And then what's your annual income based on a W two or a 10 99? You know, what are you actually taking home every single month?

They're gonna let you know what their income is. There is a bare minimum qualification, obviously when it comes to income and financing.

But we'll cover that later. So basically you're gonna have your qualification written in here and then only move on if they meet one of the three qualification criteria, which again, we'll go over those in the next section.

So you've now qualified them, you know, that they are in fact, aligned with your offer. They are in fact you know, someone that you can actually get across the finish line and, and through funding they can afford it. They're ideal. Now it's into the next step. Next step in the discovery, you'll ask question four. And question five is a vital one I've left in here that I urge every single business owner to use.

And it's, can you gimme a 30,000 foot view of how you acquire result, you know, from how you get result, the overall process.

So again, backing into the fitness space, can you gimme a 30,000 foot view of how you actually are training right now?

You know, from your regimen on the mornings, the evenings whatever it may be, you know, just your overall process for, for actually getting your result.

Now they're gonna give you very clearly what they're doing. And most times this is gonna be one of the biggest holes that they have, is their routine or their process or whatever it may be.

If it's a business or a personal or an individual. This right here is going to be one of the most essential questions that you ask.

And make sure that you're writing this out because it's gonna be a massive pain point that you'll use later in the call and it's gonna really, really equip you well.

So move into question six, question seven, question eight, question nine, question 10, question 11, question 12. And then number 13, briefly, what does your current day-to-day look like?

Have them explain, you know, what they're doing on a day-to-day basis, what they're actually up to on their, you know, 12 to 14 to 16 hours of of being awake.

What are they actually doing? And then ask them, what do you wish you could remove from your day-to-day currently? So now they've opened up, they've told you what they're doing.

Huge pain point is gonna be brought up right here. This is one of the most vital things every person's gonna tell you.

Exactly. If I could remove this, it would be Great if, if I could get rid of this, I would be so happy, I'd be so refreshed.

And make sure you write this down. So, question number 14, creative question here. If hypothetically you could craft one dream employee routine result that came to you tomorrow, what would it do?

Or what would they do and what would accomplish it? Accomplish or what would they accomplish? This is going to back directly off this day-to-day question, and they're gonna give you kind of the solution for what they're looking for.

Basically, if, if, if this could be fixed and this one thing could fix that for me, I would be set.

And that is a perfect alignment for you to place your product as that. And it is very, very, very powerful when you ask this question correctly.

15, if you feel this is necessary, you can ask this question. Another creative question for context sake.

Sake, if you could hit your business or life with a magic wand, is there anything else that you would change?

And finally, this may be just another layer of things that they didn't tell you the first time around. And really get some thinking like, man, these are, this is all the things I need to change.

I really need this. So backing up again from the top, like I said, it's a very methodical and we're going to build this out.

But this process is going to actually create a massive gap, a huge bit of doubt to where every person you're on the phone with realizes, man, I, I need this.

I need some help, I need guidance. I need someone or something that is going to shove me across this finish line.

And I've been looking for so long, that's why I'm out here. I'm opting into all these different things, getting these resources.

But you can be, your business can be the very first and last one where they really take action and you can change their life.

So that is the discovery section of the call. And it is a very, very powerful thing when you execute it correctly.

So after this, we will dive into the button down and how you take somebody from a discovery where they're maybe a little bit broken down they're feeling maybe a little bit like there's some issues and a little insecure and actually wrapping that up and giving them a beautiful solution on the silver platter that they can't help but eat up.

So I will see you in the next section.

Button Down

Right guys, we just finished up the discovery process of the call. Now we're gonna take them from a place where they may be feeling a little bit of doubt a little bit of insecurity, kind of uncomfortable, and we're gonna wrap all of it up.

And we're gonna provide a solution to them that they cannot say no to. It's gonna fit directly in line with what they're looking for.

It's gonna be something that they've been waiting for for so long, and you're offering this to them at no cost.

This is you going out of your way and ultimately providing solutions for your clients. So basically like I said, just finish up discovery.

Let's dive into the button down. There's two very different sections of the button down. One is if it is a very new, or we call it green client or business with no results.

And there's another one, if it's an existing or experienced business or person that has results. Now you can apply any of this to any niche.

There's always gonna be people in any client that you ever work with that's either gonna be brand new to whatever you're selling, or they already have tried something similar to whatever you're selling.

And you can use these frameworks for either or. So let's dive into if it's a fresh person, a greeny, a brand new person that has zero results.

So, awesome man, I I really appreciate you giving me all that context. I'll tell you what I feel like the timing of you hopping on the phone with us is pretty much picture perfect.

Sounds like you're ready to get this business process or outcome off the ground and start seeing success. And, you know, you've already gotten yourself in the game, which is step one, and you should be proud of it.

But you also don't have a ton of context in a process like this from A to Z. And ultimately, during this phase for you, it is vital that you align yourself with someone who can show you the ropes and who has done this time to time again across multiple niches, clients.

And, you know, since I have the luxury of being able to talk to thousands of people just like you and being a part of a company that provides a result like yours left and right, I think I have a pretty clear idea of what internal resources we can you know, actually hook you up with and would really give you that needed context and the value that you need to start crushing it.

Want me to share what those are? So basically you kind of tell them, you know, congrats, you've gotten started. You're, you're in the door, you, you dip your toes in the water but you don't really have the context or I don't think you're on the right path.

I think maybe you're, you're missing a few pieces. So let me help you out. I, I, I, you know, talked to hundreds and hundreds and maybe even thousands of people just like you, but everything that I have you know, will fill those holes.

So that's how you get through. That's the button down for a newbie, which actually ties down into the actual button down itself.

And both these word tracks do follow up into the same exact button down. It's just the intro of the button down that will change.

So let's dive into if it's an existing business that has results or an existing person or business that has results.

And let's rock with that. So, so it sounds like, you know, you have a few things going well where you'll briefly run down all the things that are, are going well.

Again, don't spend a ton of time here. You don't want to reaffirm that everything that they're doing is right and that they don't need you.

Do acknowledge that they are doing things right, but it, it also sounds like you have some constraints and problems stopping you from outcome, let luckily, or hey, you know, low hanging fruit for us to help you solve.

And just to give you an idea of some of the constraints I identified during our brief call. And bang, bang, bang, you'll list off all the areas that you wrote down in the discovery that you can help them fix.

Reestablish that doubt and make sure that you're creating that gap in that hole. And then jump right into the next line.

You know, want me to break down, you know, what I can hook you up with that'll actually kind of help you remove these as quickly as possible.

And, you know, these are all things that we've done internally that knocked down these problems when they, we ran into them.

Cool. So they've they've basically agreed to it. They maybe feeling a little bit of doubt again, and now you've offered them another form of resources that's gonna get them across and actually be a very huge value add for them.

So, awesome man. So I think there are two resources that'll be incredibly valuable for you. The first is a time training video from our founder name that breaks down the three of the highest leverage systems that we have in place that have been responsible for us.

Ideal result, every partner we work with or client that we advise, we have them implement these three systems as soon as possible.

And in the video, you'll have valuable insights on pretty much all of the problems you're running into and it'll help you bring up all the issue areas again.

So you've now reoccurred and brought up the issue areas two or three times and they're very, very aware of their problems.

Before I touch on the second thing, how does that sound? Gives you an answer. Awesome. And look, I think you'll love it.

And secondly, at company, and I think this will really be the biggest thing for you. We actually have a team of full-time executive consultants, and these guys are pros.

They're personally trained by main character or the owner or the founder, whoever you wanna place there. And they've all been massive pieces of our journey in Big Win.

They've built and mastered the framework, literally everything A to Z, front to back that makes our internal machine tick. You know, I see main character in meetings with them sometimes for hours just pouring into them.

And I often see main character go directly to them anytime that they run into a constraint just to get advice with all, with all of our, you know, internal projects.

So here's my thinking. I can set you up a full 60 minute long consulting session with one of these executive consultants, completely complimentary of company.

Is that something you'd like to take advantage of? Okay, cool. Would you like me to break down how that call will go?

Awesome. So simply put, what they'll do is basically dive deeper into your business routine life and get all the context they need in order to get your results.

They'll probably ask you to expound on some of the things you said on this call, since I'm just gonna pass the notes along to them.

But ultimately their goal will be to serve as a skip button that helps you get from where you are to where you want to be.

And they'll lay out exactly what needs to happen in order for you to get results. They're literally gonna show you how to remove current constraints.

Some of the fun stuff like how we unique feature and how you can basically Just use the skip buttons that we found to put it to work in your business, routine life, et cetera.

That sound good so far? Great. Plus at the end of the call, if they do feel like you're a good enough fit, they may even share with you.

You potentially get access to features of offer and even work with our internal team of executives, coaches at a much higher and ongoing level.

All of our executives work hand in hand with our founders and if applicable, other big credible partners, clients or associates that your business has worked with.

Now, obviously, if that is the case, you know, the drill my friend, that does require a higher level investment. But even if they don't think you're a good fit and the call doesn't end with that which unfortunately is the case for a lot of businesses and individuals, you'll still get an insane amount of value outta this one call.

Not even to mention the training video. How's all that sound? So lot to take in here? Like I said, from the top, you're basically designating their, they have experience or they don't.

So you've now designated that you've offered them a solution, right? You're gonna tell 'em exactly what it is that their solution is.

First of all, you're giving them your pre-call video in the form of a training. Now obviously part of the process is creating that pre-call video and using that as your leverage not only to create increase show rate, but it's gonna actually educate people and create better sales calls.

So the first is a time, so obviously let 'em know the time of the training video, let's call it 90 minutes from our founder or whoever the face is that will be on that video name them, breaks down the three highest leverage systems that we have in place that have been responsible for us.

Ideal result. Every partner we work with or client we advise, we have them implement these three systems as soon as possible.

And in the video, you'll have valuable insights on pretty much all the problems you're running into. It'll help you bang, bang, bang, bang, all the things that they're running into in their day-to-day.

It's gonna completely eliminate that. So you've built a ton of value. It's an extra resource on top of the one that they've already got from you.

And you have built a relationship with this person now that you're providing for them. You're giving them you know, opportunity, you're giving them things that is going to fix their problems.

So you move on from that and you dive right into the second offer that you have for them. The second resource that you have for them, which is a call with your executive consultant, which is your closer or salesperson.

Now a lot of this, like I said, there's a lot that you can fill in here, but I highly, highly recommend this script. If you have any social proof large names you worked with that are very familiar adding this into this section because this is very important.

And the value of this call is tremendous regardless of if people you know, purchase from you or not. That is what the framework should look like.

That's what the feel needs to be. It needs to feel like this is a once in a lifetime opportunity to talk to one of the greatest minds in the area that I'm trying to fix.

So we'll run through this, like I said, next section, we'll actually build it out with a, a theoretical company and you can see how it works in action.

So you've now walked through here, you've offered them the call, you've offered them the training, and they've said yes to both.

Now you're gonna go ahead and you're gonna confirm the time slot. So to get the set up for you, what time zone are you in or what time is it for you right now?

I'll let you know. Okay. And this is very, very important. Looks like we have a time or time tomorrow. Do either of those work.

Now, for those of you that don't know, those of you that do know the drop rate on appointments, showing up post 48 hours from when they're booked is dramatic.

The amount of appointments that don't show up beyond a 48 hour window is almost double or even triple what it is inside the 48 hour window.

So it is vital to get them moved as fast as possible onto a call. Literally anything next day is the most ideal.

So the one way around this that we found the best psychology to use is only giving them the option of tomorrow.

We only have a 1:00 PM or a 5:00 PM tomorrow. Do either of those work? If they say both works, go for the earlier one.

If neither time works, you can let them know, okay, well we may have some other time slots open. What does your availability look like?

Find the soonest time within 48 hours that works for them. And then you jump in. Alright, so it looks like that time on day is available and book them into the calendar for that specific time.

So we've covered the button down, we've gotten through, they've said yes to the call. They're excited about it, they're excited about the resources you're providing.

Now we've gotten them into the calendar and we'll walk through the next steps, which is the spouse, partner, anchor, as well as the a hundred dollars cancellation fee.

And then retying the training video before wrapping up the call. So I will see you in the next section where we'll cover all those bases.

Tie Downs + Pre Call Homework

All right, so we have found a time that works for the prospect. Now it comes to one of the most important pieces of the call, which is the spouse and partner anchor.

Now ultimately, if there's any other person besides the individual that has any influence over a financial decision, we wanna have them on the call with them.

So even though most people are gonna tell you I make decisions by myself, ultimately if they have any other person that's gonna be affected by a financial decision, tie 'em down.

Make sure both are on the call. So let's walk through this. Now, part of the team's consulting process is making sure that we're helping every person that needs to be helped in your business or routine, not just you as an individual.

With that said, just so I'm fully aware, are you married or do you have a business partner if applicable. So they'll give you the response.

They'll let you know, yes, I have a wife, our business partner husband, or whatever it may be. So if there is another decision maker, okay, cool.

So both of you, 100% could be on that call at time on day. Don't book in just yet if the partner or spouse cannot commit to that time.

So if that time does not work, okay, no worries. Let's find a time where you can both be on the call.

That way you guys are on the same page when it comes to your business life plan, outcome, et cetera. Find a time that works for both of them.

You'll ask, what time would both of you be available on soonest day available? If they say they don't know the other person's schedule, then roll into this.

Okay? When's the soonest you can get in touch with them to find out if, if that time works, they'll let you know.

Gotcha. So here's what we're gonna do. Then I want you to talk to your wife, business partner, et cetera, at the time that they had just told you.

And find out what time will work for the both of you. Then around one to two hours after they said that they would talk to that person, I'll give you a quick call and we'll lock in an official time on the calendar.

Does that sound fair? So if you do not have an official time on the calendar for them, skip the a hundred dollars cancellation fee because that doesn't make sense in the given context.

Instead, tell 'em about the a hundred dollars cancellation fee when you call them back and you're confronting the appointment. So you found a time, let's say we have now found a time for the prospect. They don't have anyone else has influence over their financial decisions. Let's roll into the next section here where we will tie down the a hundred dollars cancellation fee.

And first things first, I want to preframe this and let you guys know this a hundred dollars cancellation fee is the most powerful aspect of our entire sales process.

This one small thing is what allows us to have a 90 plus percent show rate on plenty of our days.

Almost a stable 80 plus percent show rate. For instance, our good friend Cole Gordon we almost doubled his show rate simply by giving him the a hundred dollars cancellation free frame a hundred dollars cancellation fee framework.

And it is a complete game changer to your business. It is also used as a filter. Now I'll tell you this, the one way to execute this section of the call And the only way to execute this section of the call is with authority.

Be confident. Make sure you tell them with authority that this is what it is. Because if any of you guys have ever gone to a doctor, you know there is a cancellation fee for most doctors.

If you've ever gotten a high level restaurant reservation, they have a cancellation fee. If you don't show up, every major high level asset that has great value will have a cancellation fee on the appointment.

I personally will guarantee you we've even gone to the extent of going around to our dentist's office, going around to, like I said, doctor's offices and literally they most times have it posted right on the wall right up front where it says, if you are to miss your appointment without contact, you will be charged X YZ dollars.

This is a very normal thing that happens, so be confident about it and push through it. Use this as your filter.

If people disagree to it, most times, put it this way, if they don't see the value in showing up or if they're unsure that they're even gonna show up and they're just kind of fluffing you at this point, the truth will come out in this section and it is not a good idea to put people on your calendar that are gonna waste an hour time slot that could be filled with somebody that is ready to go, values what you have and wants to speak to your consultant.

So let's dive through this and we'll walk through it from top to bottom. Cool. So just to double confirm before I lock you in here for the XYZ time on x yz day, you can 100% show up fully focused zero distractions with a pen and paper ready to take notes.

Like family emergencies aside, you won't be driving, you don't have to be at work doing anything else that prevent you from giving a hundred percent of your attention to your executive consultant.

No. Okay, good. Just want to double check because company does have a policy that requires us as client success managers to charge a hundred dollars cancellation or reschedule fee for these appointments if you're not able to show up to the call or don't show up.

Completely focused. And the reason why we have this policy in place is because obviously we wanna protect our executive consultant's time and we respect them and their calendar a ton.

And by the way, if that does happen for some reason, we'll just have our collections team get that from you.

Obviously that won't be fun, but like you said, it shouldn't be an issue for you. I really don't even think we have to worry about that at all.

It's honestly just a formality at this point. All that said is all good on both of our ends. So you walk them through, you let them know clearly there is a hundred dollars cancellation fee.

This appointment is port in massively important. This could be a life-changing complete discovery call for them. This could be something that completely alters their pathway and could be the biggest solution in skip button that they find.

And you're holding them accountable to following through on it. Your framework is this is to help them.

You know, if I'm committing to you, if I'm giving you the opportunity, if I'm giving you this resource and I'm taking valuable time for my consultant, I need a commitment in return.

And because of that, we have a cancellation fee. And if you're uneasy with that, more than likely you were not very confident in actually showing up to the call to begin with.

So you can just move on to the next person. Now ultimately you're not gonna run into that very often. If you correctly frame this and you go through this exactly how we just laid it out, you're gonna find that most people will not buck.

And the very few that do are people that we're gonna know show you anyways. So like I said, this is the number one key that we have that it boosted our show rate that allows us to have our calendar packed full of appointments that actually show up that aren't ditching the call industry.

Standard show rate is 40 to 50 to maybe 60% and we've consistently hovered at a 70, 80, 90% show rate.

Heck we went a whole month where we are over 90% show rate. So simply because of this tool and executing correctly, it's gonna change the landscape of your business.

So follow through with it, be confident, stern, empower with authority when you're rolling through this cancellation fee. Now we got through the cancellation fee.

We are gonna re-anchor the training video. Now one thing, like I said now one last thing before you call. Like I said, I'm gonna send you the super in-depth training, I promise you from one of our founders or the face or you know, main character name.

One thing I don't believe I shared is this training video in your call with your consultant actually go hand in hand, which is a cool part of this experience.

So the video breaks down the high leverage systems we put in place to result, and your consultant is literally gonna leverage the context you gain from the training video to get the most out of your call with them.

And after you see this, after seeing this process a bunch, I can tell you that the training is just vital to you getting the most outta your call with your consultant.

These two things, hands down, are some of the most valuable resources that I think a business owner or individual can get their hands on, which is why I love my job.

Now, I 100% need you to commit to watching that training before your call and to make it easier on you, if you put it on 1.5 x speed, it'll take about X minutes.

Is that something you can commit to? They'll respond. Awesome. So you'll for sure be able to go through that training and take notes.

No reality that that wouldn't be the case. Respond again. So double tie down another reason and write back into it cuz your a hundred dollars cancellation fee will be tied to this video.

Cool. Part of the policy I brought up a few minutes ago with you is that because this training is so paramount to your consulting call, if you aren't able to watch that beforehand, we also have a policy that our consultants have to cancel that call to protect their time, which again, will result in a hundred dollars cancellation fee, which I would hate for you to ever have to pay, but even more So, I would hate for you to miss out on your call with your executive consultant and the value in the training because obviously that would cost you a lot more than a hundred dollars.

Are we on the same page? So just to be sure that's not a problem for you. When can you sit down to watch that training before time on date?

Personally, I'd recommend right after this call since it's top of mind. But when can you 100% commit to?

Now this is one of the most powerful psychological weapons you can use and it is the law of consistency.

If you have people tell you and write down what they will do, natural human need for consistency will drive them to do it.

So they're putting a concrete date, a concrete time and making a commitment to watching this video.

They're going to be personally projected and and pushed to watch it at that time.

And if they don't, it will be on their mind that, Hey man, I told myself I was gonna do this and I'm not doing it.

And humans have a major desire to be consistent. If you haven't read the book Influence, I would urge you to go read the book Influence where it talks all about that dynamic.

But I digress. This is very powerful. It is going to be the most effective thing because they're going to commit to it.

They're gonna go watch the video, the video's gonna pre-sell the appointment, and you're gonna have a high show rate and a high close rate because of it.

So awesome man. And it sounds like a watch party. So with all that said, I'll go ahead and lock in that time slot for you right now and send over the calendar invite.

Lock in the calendar spot officially. All right, man, looks like we are locked in. I'll make sure to let Mr.

Consultant know that you are fully committed to watching that training. I think after I share my notes with him or her, he's going to be pretty excited to chat with you.

And seriously, this entire process is about to be so valuable for you. I'm stoked to see the results you get in all this.

Turns out this is my favorite part of being a client success manager. And then you'll finish up with some rapport and well done.

You have changed a life or you've scaled a business or you've changed the trajectory of somebody else and you have a very lockdown qualified and hot, hot appointment on the calendar.

So that is the entire script, the entire process. It is built with intention. It's meant piece by piece to follow each other, to stack the psychological effect from the very beginning.

It covers all four objectives of discovering where the prospect is in their journey, creating the doubt in the prospect's ability to create change or provide results and making it to the finish line.

It sells the consulting call as a solution. It doesn't sell your product in fulfillment so people aren't making a decision on what the product is without actually being on the phone with you.

And it gets the prospect committed to being on the pre-call video as homework and watching it through where you'll actually build value, build a lot of momentum to go into the close call and you're going to have a ton of success because of it.

So that is a script. Hope you guys enjoyed it. In the next section, we are going to actually build out the script for an example company so you guys can see it in action and go all the way through it top to bottom.

So I will see you there.

Self Setting Adjustments

All right guys, so we just went through the entire appointment booking process. Now I'm gonna show you how to change the process if you are self setting.

So essentially, if you do not have a different person setting and closing and it's all gonna be the same person or it's gonna be you, there's minor tweaks to the script that we have to make in order to make it congruent with the process.

So that being said, let's dive into the changes. We're gonna breeze over the pieces that are the same and we're gonna dive into the exact spots where it's different.

So I will jump into this piece by piece. Alright guys, so first things first, the intro. Let's walk through this. Starting at the top. Hey name. Hey name. This is your name from company. I'm giving you a ring because it looks like you opted into one of our ads looking for more information.

Awesome. And by the way, Naim, this call is being recorded for the classic quality assurance purposes.

But I'm actually an executive consultant over here on company's client success team.

So I'm really just reaching out to make sure that you get the most outta the current resource you opted in for.

And also, at the end of the day, we insert credibility. So I mean we are really familiar with this process, so if I can just ask you a few questions may be able to get you paired up with some more internal resources that may be more valuable for you.

But I mean, first off though, what piqued your interest and had you opt into company? So as you can see, not a lot has changed here.

It's just a small verbiage adjustment, framing yourself. You are the executive consultant on the success team. Same intro though, nothing else is changing.

So we get into the intro, the fit check will become or stay the same. Deciding the direction will stay the same.

The discovery will stay the same. There's nothing that will change in here. Ask your 15 discovery questions and now we'll get to the button down where the second change in the script comes.

So minor, minor adjustments, but let's go through it and dive in. So, awesome, I appreciate you giving me all that context and I'll tell you what I feel like the timing of you hopping on the phone with us is pretty much picture perfect.

It sounds like you're ready to get this business product process outcome off the ground and start seeing success and you've already gotten yourself in the game, which is step number one and you should be proud of.

But you also don't have a con ton of context on a process like this from A to Z. And ultimately during this phase for you it is vital that you align yourself with someone who can show you the ropes and who has done this time and time again across multiple niches clients.

And since I have the luxury of being able to talk to thousands of people just like you and being a part of a company that provides a result like yours left and right, I think you have a pretty clear idea of what internal

resources that you know, I can hook you up with and would really give you the needed context and value you need to start crushing it.

So I mean, would you want me to share those? They're gonna say yes, of course, of course. I want you to share that with me.

This is going to stay the same if they're an existing business or have existing results. So awesome. I think there are two resources that'll be incredibly valuable for you.

The first is a time training video from our founder Name that breaks down the three of the highest leverage systems that we have in place that we have been, that have been responsible for us.

Ideal result. Every partner we work with client, we advise, we have them implement these three systems as soon as possible.

And in the video you'll have a valuable insight on pretty much all the problems you're running into. It's gonna help you x, yz, X, yz, X, y, Z.

Before I touch on the second thing, how does that sound? Sounds great. Awesome. Cool. I think you're gonna love it man.

And secondly, at company, I think this will be the biggest thing for you. We as executive consultants offer one hour consulting sessions to folks that fit our mold and are serious about result.

And I say this humbly, but we are the pros. We are personally trained by main character, whether it's founder, owner or the face.

And we've all been massive pieces of our journey in Big Win. We've built a, mastered the framework, literally everything A to Z, front to back that makes our internal machine tick.

Main character is often in meetings, sometimes for hours just pouring into us alone. And truthfully main character comes directly to us anytime that he runs into a constraint to get advice with, you know, all of our own internal projects.

So here's my thinking. I can set up a full 60 minute long consulting session with me completely complimentary of company.

Is that something you'd wanna take advantage of? Yeah, absolutely. Okay, cool. Would you like me to kind of break down how that call will go?

So simply put, what we're gonna do is basically dive deeper into your business routine, your life, and get all the context we need in order to get your results.

We'll retouch on some of the things you said on this call since I'll have some time to look over the notes. But ultimately our goal is just to serve as a skip button that helps you get from where you are to where you want to be.

And we're gonna lay out exactly what needs to happen in order for you to get results. I'm literally gonna show you how to remove your current constraints, some fun stuff like how we unique feature and how you can basically just use the skip buttons we found to put to work in your business life routine, et cetera.

That sound good so far? Great. Plus at the end of the call, if it seems like a good enough fit, I can share with you how you can potentially get access to all of our feature, feature and even work with our internal team, executives, coaches, trainers at a much higher and ongoing level.

All of our executives, coaches, trainers, work hand in hand with our founders, some of our closest friends like social proof of applicable.

Now obviously if that is a case, you know the drill my friend, that does require a higher level investment.

But even if we decide you're not a good fit and the call doesn't end with that route, which unfortunately is the case for a lot of businesses or people, you're still gonna get an insane amount of value out of this one call.

Not even to mention the training video. So how does all that sound? So as you guys can see here, some minor tweaks, a little bit of adjustment, just framing this as you know, you're gonna be speaking with me, this is what I do, this is where I come from, this is my social proof, this is what I do for training, this is how I have mastered everything.

I'm one of the most influential assets I've gotten. All The, the context you fit the mold that I'm looking for and I want to help you.

You're the person that fits exactly the type of person I can personally help. And then you're gonna book them in onto a call with you specifically.

So just like I said, running this back over, the only thing that is a little bit different is like I said, the second piece here.

Awesome. I think you'll love it. And secondly, at company, I think this will be the biggest thing for you. We as executive consultants offer one hour consulting sessions to folks that really fit our mold and are serious about result.

So from there everything's gonna flow pretty much the same minor tweaks, you're gonna confirm the time slot. As always, you're gonna spouse, partner, anchor as ois.

There's not much that is changing here. Everything's gonna smooth smoothly, everything's the same. And now we're going to get into the a hundred dollars cancellation fee where we'll have a minor tweak as well.

So cool. Just to double confirm before I lock you in here for that 2:00 PM tomorrow, you can 100% show up fully focused zero distractions with a pen and paper ready to take some notes.

Like family emergency society won't be driving, have to be at work or doing anything else that would result you know, prevent you from giving a hundred percent of your attention to myself on the call.

Good. I just wanna double check because company does have a policy that requires us as executive consultants to charge a hundred dollars cancellation or reschedule fee for these appointments if you're not able to show up or show up to the call.

Completely unfocused. So the reason why we have this policy in place is because obviously we wanna respect our time and we want to ensure that these spaces are going to people who are committed to making change or outcome.

And by the way, if that does happen for some reason, we'll just have our collections team get that from you.

Obviously that won't be fun, but like you said, it shouldn't be an issue. I don't think we really have to worry about that at all and it's literally just a formality at this point.

All that said is all good on both of our ends. Yes. Cool. So as you can see here, just changing and tweaking the adjustment that you know inside here there's a hundred dollars cancellation fee that you know you must show up fully attentive to myself.

We need to make sure obviously if you've built enough value in yourself and and enough value in the call after your discovery people are gonna have no buck.

And like I said in the previous video, this is your filter. This is the filter for people that are serious that wanna show up and people that are not serious, that are just kind of riding along in the call and don't know what to say.

So they're just gonna buck at the a hundred dollars cancellation fee and that's your quick out to know who's serious and who's not.

So final piece here into the anchoring of the training video. There is a minor, minor tweak here. So now one last thing before your call, like I said, I'm going to send you the super in-depth training, I promise you from main character name.

One thing I don't believe I shared is this training video and your consulting call with me actually go hand in hand, which is a cool part of this experience.

So the video breaks down the high leverage systems that we put in place to scale. And I'm literally just gonna show you, you know, I'm, I'm literally gonna leverage the context you gained from the video to get the most Out of, of your call with us.

So after seeing this process a bunch, I can tell you that the training is just vital to you getting the most outta your call.

These two things hands down are the most valuable resources I think a business owner individual can get their hands on, which is why I love my job now I need you 100% to commit to watching that training

before the call and to make it easier on you, if you put it on one x 1.5 x speed, it'll take you about x amount of minutes.

Is that something that you can commit to? So the rest of this is going to be the same. Nothing else is changing here.

We're going to jump down to the bottom and the last thing that has changed is the final outro. And it goes like this.

Alright, looks like we are locked in. I'm going to go ahead and dive into my notes and put together a huge win for you.

And seriously, this entire process is about to be so valuable for you. I'm stoked to see the results you get and how all this turns out.

And like I said, this is literally my favorite part of being here. Consultant here, cool it down, finish up with some report.

Well done. You have changed another life. They're well in their way to purchasing your product, which ultimately is all about making a difference in that person's life or in that person's business.

So like I said, this is the adjustment for the self setting version of the script. Not much is changed, just some minor verbiages that change and tweak.

But you can use the same exact framework and don't have to completely rewrite how you're building the system in general.

So that is the self setting process. I will see you in the next section.

Building The Script (Example Company)

All right, we have walked through the entire set script. We have showed you how to basically change the entire thing for a self setting process.

And now I'm actually gonna walk through and build out the script using an example theoretical company called Landon's Tech Sales Academy Landon's Tech Sales Academy Coaches and trains Tech Sales Pros through a digital academy.

The program costs is 5K and it includes a one-on-one training as well as a job placement. So we're gonna go through section by section.

I'm gonna fill this out. I urge you if you would like to have your own version of this and fill it out as we go.

And basically word for word, you can snipe our entire process and input everything from your business and have a very, very, very effective and smooth setting process.

So let's go ahead and get started with the intro. So it's gonna go the same way. Hey, name, Hey name.

This is your name. We'll leave this here because if you have more than yourself or you have a team, obviously they can input their own name from company, from Landon's Tech Sales Academy, giving you a rank because it looks like you opted into one of our ads looking for more information response.

Awesome. By the way, name, this call is being recorded for the classic quality assurance purposes. And I'm actually a manager over here on Landons Client success team.

So I'm really just reaching out to make sure you get the most out of the current resource you opted in for.

And also, at the end of the day, we, and this is where you want to insert your credibility. Now, this is very, very, very important.

So whatever a big win for your company is, whatever it may be, if it's how many clients you're working with, some massive results you've gotten in the past, you wanna establish your authority and credibility within the first minute of the call.

And this is a very effective place to do it. So for Landon's Tech Sales Academy, we're going to say have trained and placed over 2,500 sales pros in the tech industry.

So we are familiar with this process. So if I can just ask you a few questions, I may be able to pair you with some more internal resources that may be valuable for you.

But I mean, first off though, what piqued your interests and had you opt into Landon's Tech Sales Academy? So that is the intro.

Very simple, very easy, not much to filter out there, but we'll run through it from top to bottom real quick.

So, hey name, Hey name. This is Landon from Landon's Tech Sales Academy. I'm giving you a ring cause it looks like you opted into one of our ads looking for more information.

Awesome. By the way, Naim, this call is being recorded for the classic quality assurance purposes and I'm actually a manager over here on Landon's client success team.

So I'm really just reaching out to make sure you get the most out of the current resource you opted in for.

And also, I mean, at the end of the day, we have trained and placed over 2,500 sales pros in the tech industry.

So we are pretty familiar with this process. So if I can just ask you a few questions, I may be able to even, you know, pair you with some more internal resources that, you know, may be valuable for you.

But I mean, first off though, what piqued your interest and had you opt into Lay's Tech Sales Academy?

Awesome. So that is your intro.

Let's move on and let's dive into the fit check. So the fit check, like I said in the previous videos, is all about having a core alignment with your product and the result that you produce.

If they're not aligned with your offer, very hard to sell them obviously. So think of your ideal client and your offer and how that aligns and what is the question that you could ask to make sure that that person as well as your product is directly linear in alignment.

With Landon's Tech Sales Academy, it's very simple. It's one of the most obvious questions, but are you currently seeking a role as a tech sales pro?

Very simple. Not always will this be as simple. Some niches are a little bit more complex where you can get a little bit more in the weeds.

But for this specific instance, all you need to know, are you currently seeking a role as a tech sales pro?

That is the archetype of our customer. They're seeking a role, they want to become a tech sales pro. So if yes, move on to deciding the direction.

Now for some reason they say no. Here's where you're gonna ask them a context based question. You're gonna ask them, are you open to exploring the option?

And then you'll give them a little bit of reason why bias, because in all honesty, we're only looking to work with serious clients.

Let me change this up here. Work with clients that are serious about progressing in a tech sales role. So obviously if they're on the phone with you and they're not even open to exploring the option, becoming a tech sale tech sales pro but for some reason happen to opt your funnel you can discover that now we're only about three minutes into the call if that maybe two minutes dispose of the person and move on to the next call.

So, very simple here. Are you currently seeking a role as a tech sales pro? If yes, move on. If no, got it.

Okay. Are you open to exploring that option? Because in all honesty, we're only looking to work with clients that are serious about progressing in a tech sales role.

Boom, they'll let you know there either move on, filter out and into deciding the direction. So deciding the direction here is gonna be very unique.

But these two questions are always gonna be very similar. And basically they're just context questions that are gonna lead into the first discovery question.

So lemme show you what I mean here. When it comes to Landon's Tech Sales Academy, what we're trying to know is what are you currently doing?

What is your current job? So what are you currently Doing for work sales question mark. So you're gonna ask them, what are you currently doing for work sales?

They're gonna let you know exactly kind of where they're at. It's gonna give you a bit of a gauge on on, you know, what is their temperature, how aware of the product or the, the tech sales industry are they, if they're maybe already in it, but they're just trying to become better, want a better placement you're gonna know immediately versus if it's, you know, your local pizza delivery boy and he's like, I wanna make a change.

I wanna become a tech sales pro. It's a different discovery model. So walking this through, what are you currently doing for work sales?

And then you will just ask, how much are you making per month with that? And they're gonna let you know, obviously this is what their, their current monthly revenue is.

And that's gonna lead directly into the first discovery question. So question number one is all gonna be context about how they feel about how much they're making right now for, for Layman's Tech Sales Academy.

Now if you own a fitness offer and you're trying to understand what is the first discovery question, typically this question's going to be, you know, how much have you lost so far?

How much weight have you lost so far? How much muscle have you put on so far? And then the next question is basically going to discover if they're happy with that result.

So in Landon's Tech Sales Academy's case, the first question will be, are you comfortable at that number? Now most people aren't looking for a change of jobs if they're comfortable with where they're at. But we want them to admit that. We want them to say and have that doubt of, you know, I'm not comfortable with where I'm at.

I need your guys' help. It's building value in in our product. And so essentially if they tell you, I'm not comfortable at that number, if not, Got it.

So what has you on edge, I guess what has you on the fence about that? Very simple. So are you comfortable with that number?

No, no, I'm not very comfortable. Got it. Well, so what has you on the fence about that? They're gonna kind of feel you in and they're gonna tell you exactly, you know where their pain point is here.

They either have a lot of bills to pay or they need a life change or they need something different, they need to make an adjustment.

So you're gonna open that up and now you can continue to ask context questions here. But for this case in Landon's Tech Sales Academy, that's really the, the only context I need is, are you comfortable at the number you're currently making per month?

And if not, what has you on the fence about it and why are you uncomfortable? So Now I'm gonna write down the answer.

I'm gonna figure out, okay, so they're uncomfortable because of X, y, and z. Second question is immediately gonna follow up with where do you want to be?

So if I'm uncomfortable at this current income, where do I want to be? Now they've established the gap, I'm here, I'm uncomfortable, I want to be here.

Now in Landon's tech sales Academy's case, I'm probably gonna maybe adjust the qualification to number question or question number four or five.

Cause there's a couple more context questions. I'm gonna get clicked in here, but we'll run this through it. Number three for now.

And I'll show you how we will mold this. So now obviously a big thing that determines what direction the academy can point you in is the available capital you have.

Because obviously that does affect a rote that an individual can take a pretty solid amount. So kind of gimme some context and an idea for you, an easy way to ask this is if hypothetically you had a confirmed job offer that you knew a certainty would produce the income you're looking for, but you wouldn't see That opportunity For a month or two, how much would you be able to find?

How much would you currently be financially capable of putting into that factoring in liquid capital, available credit, et cetera. So you've ultimately molded the question will actually run through this from the top.

And if it sounds tacky then you just change it, you make some adjustments. So let's run through this. Now, obviously a big thing that determines what direction the academy can point you in is the available capital that you have.

Cuz obviously that does affect the road. An individual can take a pretty solid amount. So to give me some context and an idea for you, an easy way to ask this is if you had hypothetically had a confirmed job offer that you knew with certainty would produce the income you're looking for, but you wouldn't see that opportunity for a month or two, how much would you currently be financially capable of putting into that process, factoring in liquid capital, available credit, et cetera.

So seems very smooth, has a lot of context, it makes sense obviously if you knew you weren't gonna have the job for a few months and you're gonna be sitting idle, how much capital would I have to live on?

So you're gonna know right there you've qualified them based on their capital. Moving on to second question. Okay, cool. And then for context on what type of, you know, funding you could possibly get for marketing plans, other context and other high leverage points for the business individual, et cetera.

What is your TransUnion credit score? Now here's where I'm gonna urge you the, the most to basically do a deeper dive and build the most context around what works for your business specifically in your clientele.

So for this, because it's not a real direct route you know, we can actually be very straight to the point and I can ask.

And then for context on what type of funding you could possibly get for training tools and other high leverage points for The tech sales role, what is your TransUnion credit score specifically?

Now, again, I know that there's, there's, there's always gonna be that point where it feels like, man, I I can't really find a reason why I'm, I'm asking people for credit.

I'll tell you this, find the way that justifies it the most that makes the most sense. And I'll still promise you about 90% of people are gonna tell you their credit score.

People aren't gonna really dive into it. They're actually in the mode of just asking, answering questions. There's clearly a pain point.

You've already opened that up. So you've opened the first wound and you're just basically trying to scope them where you could go.

Now this is why I say maybe moving this up and down inside of your questions makes more sense, but for now, try it out at number three.

And if it doesn't really work at number three, if you're not building enough trust with people move it down in the, the ladder of questions.

And now we will basically, you know, we test with this a lot. We, we move it around, we might try it way at the beginning.

We might try it way at the end. So do what's best for yourself and do what's got the highest conversion for your own business.

So, all right. Okay, cool. And for context on what type of funding you could possibly get for training tools and other high leverage points on the tech sales role, what is your TransUnion credit score specifically makes actual contextual sense?

So I'm gonna roll with this and if they ask why this matters, one of the biggest challenges we see holding back individuals we consult is their ability to secure funding and capital over things like training training and other tools to elevate their skills.

We've just seen it affect the results rate and credit score just happens to be the best indicator of what your pen potential for that is and definitely influences the outcome and game plan we give our clients for Acquiring a sales role.

That's why we ask. So you move through there and then we're gonna walk into the annual income or W two eight, or sorry, an annual income on based on W two or 10 99.

So same question will apply there and now we'll move down to question four. Now all of these are going to be completely based off of your offer in your business and what is gonna build the most doubt.

Now question number four, I am going to literally ask right away how much sales experience do you have? So how much sales experience do you have?

If it's a ton, write it down to something positive. If they don't have any, write it down as an issue.

Next question. Can you gimme a 30,000 foot view of how you acquire a result? Now this changes with our dynamic here, 30,000 foot view of how our 30,000 foot view of your current sales process from how you discover clear objections, you know, the overall process.

So I wanna know how much do they actually know about sales? How much are they actually how much are they actually in tune with the process of selling?

So, you know, I'm gonna ask them, can you gimme a 30,000 foot view of your current sales process, you know, from how you do a discovery, Clear objections, you know, the overall process.

Now some of that is a very high level sales pro. They're going to go in and tell you, this is what I do.

I kind of just like walk through this and I knock this out. I do this, this is my process. X, y, z.

Somebody with not much experience is gonna tell you, I don't know I don't really have oh, sales process, which is great.

It's built doubt in them. It's essentially they, they know they're gonna need one of those. So it's a great way for them to feel that doubt that they need your help because they don't have the process there.

So we're gonna move into the next question, which will be how many sales calls have you been on?

Question seven, what is your close rate on those sales calls?

You kinda see how this tracks. So we've started at the top, obviously, are you comfortable at the number that you're currently at?

Where do you want to be? Got it, okay, they're qualified. How much sales experience do you have? Can you gimme a 30,000 foot view of your current sales process?

You know, from how you do a discovery, clear objections, you know, the overall process, how many sales calls have you been on, was your close rate on those sales calls?

And then next for question eight, Now I'm going to begin to instill doubt in their understanding of how to actually acquire a high level sales job in the tech sales space.

And I'm just gonna ask a simple question. Are you aware of how the tech sales industry scopes for talent?

If no, you're gonna say another context.

You're gonna have another context based question here. So if no, have you ever applied for a job in tech sales?

And if yes, Oops, So you're aware of the competitive of nature then, right? Again, subtle, subtle questions that are just doubt.

So what is your closing on those sales calls? Are you aware of how the tech sales industry scopes for talent?

If no, have you ever been applied for a job in tech sales? If yes, so you're aware of the competitive nature then, right?

Got it. Okay, question nine. So question number nine will be what sales training have you done? We'll probably put in the past and we'll move on.

So if they obviously tell you, well I haven't done any, that's an issue. If they tell you they have in all the names, that's something positive.

Question number 10 is, do you feel confident That You Could Perform at the top of any tech company at this moment?

It's obviously a very contextual question. Do you feel confident that you could perform at the top of any tech company at this moment?

Most people are gonna tell you no, I would assume. And that's why they're actually looking for your help. But you want to extract that.

You want them to feel that there's a reason why. Obviously they have an interest. They clearly don't probably have the tools to be the number one salesperson, but you're the one that's gonna get them there.

And then question 11, question 12 we won't touch on those at this point. Obviously if you want to continue to expunge more questions and fill in the blanks there, definitely do.

But I'm just gonna go through 10 of these and then jump into obviously 13. What does your current day-to-day look like?

What do you wish you could remove from your current day today? This will be a great question. No matter the niche, no matter what happens.

So creative questionnaire. If hypothetically you craft one dream tech sales job that came to you tomorrow, what would it pay and what would it look like?

This will be very contextual for Landon's tech, sales company because if I want to know exactly what this person is looking for in a job, in a tech sales role, they're going to tell me exactly what they want right here.

And if it directly aligns with the placement, I can give them. We have a winner. We have a very, very clear winner, they're very qualified.

They want exactly what I have. It's my job now to make sure that I get them into the hands of somebody that can get them what they want, which happens to be my consultant.

So again, creative question. If hypothetically you could craft one dream tech sales job that just came to you tomorrow in an hour, what would it pay and what would it look like?

Boom. They're gonna write that down. And then now if you feel it, another creative question for context's sake, if you could hit your career with a magic wand, is there anything else you would change?

You get some context here on this. So moving into the button down. So if a new sales pro person with zero experience, awesome, I appreciate you giving me all that context.

I'll tell you what I feel like the timing of you hopping on the phone with us is pretty much picture perfect. Sounds like you're ready to get this Tech sales career off the ground and start seeing success. You've already gotten yourself in the game, which is step one you should be proud of.

But you also don't have a con A lot of context on a process like this from A to Z And ultimately during this phase for you is vital.

You align yourself with someone who can show you the ropes and who has done this time and time again across multiple mediums of tech sales.

And since I have the luxury of being able to talk thousands of people just like you and being part of a company that places sales pros like yourself left and right, I think I have a pretty clear idea of what internal resources we have that I can hook you up with would really give you that needed context and value.

You need to start crushing it. Want me to share what those are? Beautiful. So if an existing sales pro, so it sounds like you have a few things going, well run through all things that are going well, but it also sounds like you have some constraints problem stopping you from climbing to the top Of the industry.

There are luckily low hanging fruit for us to help you solve. Just to give you an, in an idea of some of the constraints identified during our brief call list off all the issues and areas that you wrote down that we can help them fix.

I'm break down, boom, boom, boom. Now we're gonna move into this and two incredible resources that will be incredibly valuable for you.

The first is a 90 minute training video from our founder Landon that breaks down the three highest leverage systems that we put in place that have been responsible for us placing sales pros in the top 50 tech companies in the us.

Every partner we work with our client, we advise, we have them implement these three systems as soon as possible. In the video you'll get a valuable insight on pretty much all the problems you're running into and it'll help you with bring back up issues.

Before I touch on that, how's all that sound? Awesome. I think you'll love it. And secondly at Landons and I think this will be great for you, boom, boom, boom.

There's not much we're changing here. They're personally trained by main character. Whoever creates the pre-call video for you is who you're gonna name here, trained by Landon.

There'll be massive pieces in our journey To, they've all been massive pieces of our journey to reaching 2,500 sales reps placed in six figure plus roles.

The built mastered the sales framework, literally everything A to Z front to back that makes our internal machine tick. I see main character Landon in meetings with them, sometimes hours just pouring into them.

And I often see Landon go directly to them anytime they run into a constraint with all the advice or to get advice with all of our own internal projects.

So here's my thinking. If I can set a full six minute long consulting session, completely complimentary of Landons is something you would take advantage of now.

So simply put, what they'll do is dive deeper into your sales experience and get all the context they need in order to get results.

They'll probably ask you to expound on some of the things here. Yep. Boom, boom. So next piece here, they're literally gonna show you how to remove your current constraints.

Some fun stuff like how we, and this will be an inputted unique feature of, of your fulfillment. So theoretically for Landon's Tech Sales Academy, we're going to say some fun stuff like how we Hack relationships with the 50 highest paying tech companies and how you can basically just use the skip buttons we found to put to work in your let's call it journey to a new tech sales roll.

That sound good so far? Great. Plus at the end of the call if they do feel like you're good enough fit, they may even share with you how you can potentially get access to features of offer, which is very simple.

First off here, how you potentially get access to our white list of premium tech companies and even work with our internal team of coaches at a much higher and ongoing level.

All of our coaches work hand in hand with our founders, other big credible partners. So here's where I would typically place anyone that's big in in the industry that we have placed people with or that we have names with.

So I get to say, say and tech company one, tech company two, and you guys get the gist. So now obviously if that is the case, you know the drill my friend, that does require higher level investment.

But even if they don't think you're a good fit and the call doesn't end with that route, which unfortunately is the case for a lot of individuals, You'll still get an insane amount of value outta this one call.

Now even mention the training video. How is all that sound? And now a lot of this stuff will be the same thing until we get to the spouse, partner, anchor.

Now part of the team's consulting process, make sure we're helping every person that needs to be helped in your journey and not just you as an individual.

With that said, just so I'm fully aware, you married and for this case you would not have a business partner.

Boom. So we are all in here if that time does not work, let's find a time where you can both be on the call so you are on the same page when it comes to your journey and we'll keep rocking down here and the next step where we need to make a change is here in the button down.

Okay, good. Just wanna double check because the Landons does have a policy that requires us as client success managers the cancellation fee and we are rocking in here.

And now the last section where we have to make an adjustment. And one last thing for your call, I'm gonna send you the super in-depth training, I promise you from one of our founders Will Landon, one

thing I don't believe I shared is that this training and your call with your consultant actually go hand in hand, which is a cool piece of this experience.

So the video breaks down the high leverage systems we put in place to increase our trainees close rates by 10% and your consultants literally gonna leverage contacts you gained from the training video to get the most outta your call with them.

And after you've seen this process a bunch, I can tell you that the training is just vital to you getting the most outta your call with your consultant.

And these two things hands down are some of the most valuable resources I think A tech sales pro can get their hands on, which is why I love my job.

Now, moving on basically in here, the only thing we need to change is this here. If you put it on 1.5 x speed, it'll be about 60 minutes.

Awesome. You'll sure be able to go through that boom, boom. Nothing else we need to change here and we are rocking and rolling and that is the script from top to bottom.

So I know this video is kind of long but as I said, all you have to do is go in here filling all these out.

These are just discovery questions that are relative to your business. The main thing is making sure you have a fit check.

Are you currently seeking role as a tech sales pro? It is basically my ideal mold to my client. What is that? Are they looking to become that? If not, of course I can't help them. So get off the call and move on to the next.

And then once we do that, we're gonna decide the direction. What are you currently working? Where, what are you currently doing for work?

Is it sales? How much are you currently making per month with that? Got it. Are you comfortable with that number?

If not, got it. So what has you on the fence about that? Another context question if needed, where do you wanna be when it comes to income qualifications, making sure they can actually afford the funding.

Finally, how much sales experience do you have? 30,000 foot view. Some more context questions that are establishing doubt. On any of these questions I will say this, especially things like what is your close rate on, on those sales calls?

We always tell our clients if below 20% save this. Okay, that's definitely something we can work on. So you're not really taking jabs, you're not stabbing too deep you're just making a note.

Okay. What's your close rate on those sales calls? If it's below 20%, okay, that's definitely something we can work on.

Got it. Are you aware of how the tech sales industry scopes for talent? No. Okay. Have you ever applied for a job in tech sales?

No. Okay, got it. If yes, so you're aware of the competitive nature then, right? Got it. Okay. What sales training have you actually done in the past?

Got it. Okay. Do you feel confident that you could actually perform at the top of any tech company at this moment?

Got it. And then I would typically still add two more questions in here. But for the sake of time, I definitely wanna make sure I keep this as short as possible.

So that is how we will formulate the script. So now you're gonna have a completely blank slate for yourself. Go through this, like I said, in the in an hour and walk through, build it completely to your liking, and ultimately knock it out and use our framework.

Like I said, this framework has basically been completely, completely the responsible you know, millions and millions of dollars are that are the direct responsibility of this framework.

And so I'm excited for you guys to have this. I'm excited for you to really implement this in your business and have a tool that is effective.

So I will see you in the next chapter.

The Straight Line Of Evaluation

Welcome to the Setter training. So in part one, I'm gonna walk you through the most impactful method for improving your team's performance and dialing in your setting process.

After this section, you're basically gonna be able to walk away with complete clarity on how a simple game of math can add hundreds of thousands of dollars, if not millions, to your bottom line.

So here's the thing. After I've trained 75 plus reps on our setting process, I learned one valuable lesson.

Basically, trying to master an entire system at one time will inevitably lead to mediocre results.

Basically, I'm a firm believer in the phrase that Jack of all trades is a master of none. My dad literally told me this every single day growing up, I used to think it was the stupidest thing I could ever hear.

Now I believe them. <laugh>. I mean, literally, this is one of the most effective things that we take into account in our setting process, because the same thing can be said about your appointment setting process.

The setter who has awareness of their greatest weakness and master that piece of the process will progress faster and set higher quality appointments than the setter who is trying to master the whole process in one swing.

I tell our team frequently, you can't seek solutions if you don't know the root issue. Never get the buggy in front of the horse.

It just doesn't work. So with this in mind, we've adopted a model for increasing performance that is nearly two Xed.

Our efficiency in improving our set team simply by having an awareness first approach. Not only has it allowed us to rapidly improve our skillsets, but it allows us to rapidly test process improvements with instant measurable feedback.

It's really, really simple. We call it the straight line of evaluation. Now, if you think of a sales funnel, typically from the top you have, when someone sees an ad clicking to see the landing page and opt-in, they receive a eaq, the set will book an appointment, close or close the sale, and you collect cash in the same way that you look at your sales funnel.

We can look at set performance, starting with the seven phases of setter performance. First one's gonna be dials, second one's gonna be pickups.

Third one's gonna be one minute conversations. Fourth one's gonna be 10 minute conversations. Fifth one's gonna be offers, sixth one's gonna be sets, and the seventh and final one is going to be the sets that close.

So it becomes very, very simple. You can simplify your training focus to one of three areas by measuring work ethic, tonality and cadence and raw sales skill simply by analyzing each section of your teams or yourself line of performance.

So the focus areas are very simple. Like I said, dials is work ethic. You can only equate work ethic to one simple thing.

How much output is coming out of the player, the salesperson. That is the way to measure how hard is this person working?

Is their output dials? Second one the tonality and cadence. What is their pickup to one minute conversation rate their one minute to 10 minute conversation rate.

This is, is the most vital way to understand is somebody out of cadence, do they have a poor tonality? Are they not in the correct tone with the prospect model that they're speaking to?

These three metrics will literally give you the clearest pathway to understanding that. And finally, your raw sales skill comes from the offers, sets, and closes metrics.

So let's use a quick example. Let's assume that your team had these numbers for one week on the phones, 2,500 dials, 450 pickups, 315 1 minute combos, 190 10 minute combos.

126 offers 90 sets, 31 closes. And let's assume your average sale price is \$5,000. That's \$155,000 in revenue for your business.

So let's see what happens if nothing were to change. But you elevated the work ethic of your team, and by doing so, you now have 4,000 dials, 720 pickups, 500, 4 1 minute conversations, 304 10 minute conversations.

202 offers 144 sets and 50 closes. And let's still assume your average sale price is \$5,000. That's 250,000 in revenue for your business.

That is absolutely incredible. It's 62% more revenue for your business making one simple adjustment. So you can kind of see how having an effective training system like this narrows down your time also produces way clearer and cleaner results and is way more productive to you during the day.

So let's go one level deeper. Let's assume you have elevated the work ethic of your team, increased revenue by 62%, and then spend a week training on tonality.

That results in a 10% increase in pickups that turn into one minute conversations. So you still have your 4,000 dials, still have your 720 pickups, but now you have five hundred and seventy six one minute conversations that turn in 351 10 minute conversations, 233 offers 166 sets, 58 closes.

And let's again assume the average sale price is still \$5,000. That's \$290,000 in revenue, a \$40,000 increase with one tiny, tiny tweak in your setting process.

So it's really that simple. And not only that, it's efficient. You can spend half the time training while seeing two times the results.

And the best part is you can use the same method for training individuals on your team because pretty much, let's face it, John is not Joe Jack is not Jim, every single player on your team has unique needs.

So in the next section, I'm gonna go through a document where I'm gonna show you exactly the, the target areas and the different metrics you can train upon and how to diagnose and how to basically execute this system to a t.

So I'll see you in the next section.

The Straight Line Of Evaluation Pt 2

Alright, in the second and last piece of the Setter training and how to use the straight line of evaluation to evaluate your players, I'm gonna walk you through two very different instances in how the training routine that follows them would be affected.

So let's start off with John who has 145 dials, 22 pickups, 11 one minute conversations, eight, 10 minute conversations. Eight offers, five sets and two closes versus Joe who has 97 dials, 14 pickups, 12, one minute conversations, eight, 10 minute conversations.

Eight offers five sets and the same two closes. So with John, he has a 50% pickup to one minute convo rate.

Immediately. When we look at his data, we know that there is a very clear target area for improvement.

So basically what we know is there's three different sections like we covered in the last training that you can measure for performance adjustment.

One is output or work ethic, second is tonality or cadence. And third is raw sales skill. So this falls into the tonality and cadence metric.

So seems like John is having a hard time actually getting through his intro of his calls. He's not keeping a lot of people on the phone.

And so what we're gonna do is we are going to work with John in a very specific call review platform.

So John is gonna get an immediate one-on-one to create awareness of the issue. We're gonna review the first 10 minutes of the call, that's where his struggles are.

We're gonna review the first 10 minutes of a successful call and then you're gonna ask John to identify the differences.

Once he's identified the differences, you're gonna role play the proper technique. Now the goal here is if we can move John from 50% pick up to one minute conversation rate to 80%, that would move his numbers all the way up to eight sets in three closes for this day.

It's a whole extra close. It's a whole extra piff for the company. And ultimately John's making more money. Now with Joe, if we look at his data, what stands out, pretty clear, all of his numbers are pretty good. 14 pickups, 12, one minute conversations, eight, 10 minute conversations. The same eight offers, same five sets and the same two closes.

So that being said, the Dialectric seems to be a very big standout. Joe is a very efficient setter, but he is also not a hard worker, which is unprofitable for a company to have.

There's nothing worse than a very talented person that doesn't work hard. And so one of the things that we're gonna focus on with Joe is doubling his outbound dial rate.

So if he could just double his dials, that would mean that he would be bumped all the way to 10 sets in a day, four closes that would double the amount of revenue the companies doing, the double the amount of commission that Joe is making.

And ultimately everybody wins. So the training plan that we would have for Joe is an immediate one-on-one to create awareness of the issue, address the poor output, provide the money math.

So basically if output $2 \times$, then commission would equal X . So obviously I'm gonna go through, I'm gonna talk to Joe, I'm gonna basically do all the math for him.

Like, look man, here's the deal. If your dials double so all of your dials doubled, that would mean that every number that follows would double, which will mean you would end up with four closes.

And if each close is worth, you know, three, four, \$500 to a setter, that's an extra, you know, 600, 800, a thousand dollars for that day for that specific setter.

So getting people to motivate or getting people motivated to actually make a change is the number one key to anything when it comes to training.

How do we do that? Like I said, it is all in the money math. You have to make it so visual to, to your players that you know, you're missing out on this by not doing this never enforcing training as a mandatory, Hey, I need you to go and do this for the company's sake.

As much as, hey, you're cutting yourself short, you're not quite up to your own standards, I don't believe so let's make this change.

So how this would look is ultimately if I approach Joe and I know that he made let's say he made \$1,500 Last week.

I'm going to go to him and I'm gonna show him his opportunity lost. So Joe's opportunity lost is \$3,000. So simply put, I'm gonna go to Joe, I'm gonna talk to him.

I'm gonna say, look man, so you made \$1,500 last week. This is what it was. This is what your output was.

This is where everything fell. And now ultimately the biggest reason why I'm coming to you to address this is because you are leaving an extra \$1,500 on the table every time you cut yourself short.

And don't go out and dial. If I told you all you had to do was double everything you did or you know, double everything that you're doing now and you would literally make double the money regardless of any circumstance, would you do it?

And of course, every time Joe's going to do it. So always using the psychology of turning that you need to get your people to be excited about changing, excited about training, excited about moving further.

And the easiest way to do it is to basically break down in the money math what it would be. If we jump up to these numbers, like I said, if Joe was to double everything, that would mean 28 pickups, 24 a one minute conversation, 16, 10 minute conversations.

16 offers 10 sets, forec closes, let's say each close to him was you know, the ticket is a \$5,000 ticket And Joe is getting, let's call it 8% commission.

Then we know that basically Joe is missing out on a \$400 close on both of those. So that is an extra \$800 per day Joe is missing out on over a period of a year, let's call it 300 actual working days, Joe's missing out on \$800 over those 300 working days.

That is an extra \$240,000 opportunity lost because of output. So when you frame this correctly and you get your players in the mindset that, Hey, look, I'm cutting myself short, I'm not quite where I want to be, then it becomes very simple, very easy.

And ultimately your players themselves are gonna optimize because they can see beyond their nose. So this is how to utilize the straight line of evaluation.

This is how to utilize it to your advantage, your team's advantage, and create a very high level of performance within your setting Team.

How to pack your calendar with set calls through text

All right, what's up guys? In this video walk you through the backstory and why we do the text automations, kind of the philosophy behind the text animations that help us pack out set call calendars for our setters.

And so when you guys quick backstory on how we actually ended up doing this and started this. Basically we had a, a female fitness company for a while and they gotta the point, this is before Max existed, I gotta the point to where we were hit getting hit with spams so bad that there were some days we literally had A2 percent pickup break.

We'd have like 120 200 leads created. We have like four pickups, five pickups off of it. Like absolutely awful numbers that I I'd never seen before and that badly I had seen like really bad numbers of spam, but that was like a new record to get appointment.

Alright, we're spending money in ads, we have to have some way to get appointments or some not gonna make money.

Not bad spend. And so we ended up leveraging this texting sequence as a way to basically booking appointments on the calendar to where we actually able to recoup ADSD spend and be profitable as we were just, you know, starting I was company and growing it.

And this is the Texan sequence that in, in the next video here it's inside your goal level account that we use to do that and actually use this currently on our team to book you know, quite a few appointments every single day.

You use it on other companies. And so this Texan sequence we actually created, it'll help you probably book depending on your lead flow, anywhere from, you know, two to your 20 appointments and your set calendar each day 20 plus and beyond.

And this can help you get a lot of inbound qualified sets, people who are ready to talk to you, their high intent and they wanna talk to you.

And so this is a super powerful tool. And combining this tool with Max, we'll have you, you know, is blowing up your calendars, packing out like crazy, you get ahold of, you know, 50 to 70% leads with Max, then use this strategy on top of that.

That creates for an incredible, incredible pack calendar. And the efficiency on one to two set is gonna be insane cause you have a setter taking, you know, getting three or four sets a day off of inbound book calls and then getting another, you know, three to five a day off of max alone.

Just doing those two things. And we found this be able to like literally double our set output efficiency. When you combine the calendar strategy plus max we've seen massive leaps and efficiency improvements.

So go ahead, watch the video below or in the next the next page on how to actually set it up.

You're gonna have about 90% of it done already inside your account. We set up for you. All you have to do is go through, modify, like the name of your company, the name of your offer, et cetera, and then you will have everything else done for you.

And text database is being sent out on your behalf. So that being said, go ahead and watch the video from Jared, how us everything up.

Put this in place and you'll see some insane results over the next, even next 24 72 hours of implemented us.

Calender tech and 48 hour bookings

You guys in this video, I'm walk you through the the reason why and the philosophy behind our counter tech setup and our 48 hour booking rule that we had in place.

And so, you know, back when we were initially scaling some of the sales teams we had, we basically didn't have really any hard requirements on how far we book out.

We booked sets, you know, maybe it was Monday, we book 'em on Wednesday, Thursday 10, we book 'em the next week on Monday, two weeks away.

Basically like, you know, it's the wild west. We're just booking anybody on the calendar. Anytime they can do it, we put throw 'em on there.

And we did that, right? But we ended up figuring out as we're doing this, cuz it felt good cause we were getting sets on the calendar like, ah, this is awesome.

But we figured out that over the course of, you know, a few weeks that when we book sets further than two to three days out, our sure rate actually, or our show rate drastically decreased on those sets and sets within 48 hours, ideally 24, but 24 to 48 up to 72 hours.

So if it's Monday, booking that on a, the latest of Thursday, but really more so for Wednesday, the, that's actually what helped our show rate increase a lot.

That was cancellation fee, what, you know, got us to 90, 95% plus show rate on our offers. And so a lot of times people make a mistake of having their calendar open for 3, 4, 5 days.

I've seen upwards of two months at some point it was crazy. You think about it from a first principal standpoint, right?

I know you've ever booked an employment at some point in your life, most likely. But I know for me, like when I book an employment with something, it's like the, that day it's pretty easy to remember, right?

You have an alarm on your phone, you remember it next day, you know, fairly easy to remember the day after.

Like I had times where my book appointment was 48 hours out and I completely forget about them just cuz like, you know, I forget about them, right?

Life gets busy and and imagine you getting an, an appointment booked, you know, four days out, five days out, a week out.

So much happens at that time and people don't have these hardcore time blocks, you know, then things come up, the kid has to go to school, there's an appointment that comes up.

Something changes. So they have to like now shift their schedule around, right? And the more time you have between when you book the appointment, the appointment is, there's just more variables at play.

And also thinking about this as well, the person has a, it gets colder, right? Cuz they're really interested in your thing and then now they're not as interested.

They book the deployment but now it's 3, 4, 5, 6, 7 days later. They kind of forgot what they talk about in the call.

And so anyways, we found that show rate significantly decreases after about 48 hours in advance. Maxes 72 hours. And so inside your calendars when you're getting, everything is set up in your account, you have account, I wanna make sure that you don't book out more than 48 hours.

Now the only time we open up for 72 hours is if you're going over the weekend. So say it's Friday on that situation, we will, we'll book for Monday unless Saturday we will book for Tuesday as well.

But again, you have to really enter those calls in hardcore cancellation fee like everything like that or else a lot of them wind up.

No Sean. So that being said make sure you book only 48 hours out. So if it's Monday, you only book late or Wednesday, right?

So you can book on. No, we really don't do same day sets. We find those not to be super effective just cuz there's, there's not enough time.

There's kinda like this sweet spot this Gordy locks, you know, time between the set call and the close call. We found that to be about 24 to 48 hours longer than that.

They start getting cold, no sugar goes up shorter than that. If you do it same day, actually a lot of times it feels too fast for them.

If they just opted in now they're, you know, spending 5, 10, 20, 30 k a few hours later. It feels too fast and too weird for them as we find booking it.

If you're on Monday only booking for Tuesday and Wednesday, those are the ideal time ranges. So really the next day or the day after is when do we wanna be a booking appointments in?

So not the same day, not 3, 4, 5 days out, just the next day and the day after. Only over the weekends would we open it up.

You know, we can book 72 hours events your Friday. You can book on Monday. If you're Saturday you can book on Tuesday just cuz the nature of you know, obviously weekends people aren't on as much, people are busy, et cetera.

So that being said, go ahead and make sure you implement this in your training to show you exactly how to do this one, give you an overview of like, why we do this.

And it also urge you like, you know, follow the system. I least when you're getting started, follow the system to a t because we've, we've experimented, we've, you know, spent an opportunity cost probably millions of dollars and actual hard costs, hundreds of thousands of dollars testing a lot of this stuff.

So we've, you know, been able to figure out and give it a good idea where it works. So this will save you a lot of money and get your short way up and help you make a lot of money as well.

And obviously change more lives at the end of the day.

High show rate automations (texts and email reminders)

Guys, this video I'm gonna share with you the why behind these automations and also the mistakes. People often make that completely and totally just like trash your show rate with these automations. And then how you can actually use them to massive increase your show rate, right? The way that we, we laid out here, I'm so important you understand what the, the show rate automations we do. Cause we've done, yeah, a a million different tests on a lot of different things to increase show rate, right? We started out probably with around a 30 to 40% show rate, 40, 50 when we first had our, one of our initial offers and ended up getting the point where it was like a 90, 95% show rate at the end. So we've we've been around the block once, twice with this. And one of the things we discovered work, work really well are these automations. And so we have a set up to where anytime someone books a call and the closures calendar, even on the set's calendar, we have automations that go up beforehand that remind them about the call. Cause again, the thing about this if you book an appointment, either for me, if I book an appointment even 24 hours out really any appointment I book, any meeting I have, I always put an alarm on my phone. Cause otherwise I don't, I don't remember it. It's really hard to remember cause you have all these things going on, right? You're not checking your calendar, whatever. It's, and so when people don't have reminders, like just first principles wise, they forget about the appointments all the time, right? Cause they're really fired up. You on the call, the set call, they're, they're fired up, they wanna change their life. And then, you know, 24 hours later they're thinking about something else, right? A lot of times now they're still in that mode. They, they wanna make a change, they have a gap, but life is busy, right? People have kids, they have jobs, they have things that come up. And so if you don't remind 'em about the call, it's likely that they're gonna forget about it a lot of times. And so we have these automations in place to remind 'em the call. But then also what we do as well is remind them like cancellation fee. Now this is a really key point here because you know, in our experience there's been resistance to that. As in like we've, we've done this, we've tested it and we've, you know, gotten show right up. We've had, you know, team members and whatnot, closure, et cetera, et cetera, who didn't like the cancellation fee. They thought, you know, they'd, there's inevitably you will get some texts of people being upset about it which they see these texts, but people don't upset cancel their call. Like, oh my gosh, like, we should take out the cancellation fee. And so we've actually tested that and we tested it to where we took the cancellation fee outta the automations and their reminders, we complet took it away. Like, alright, right, let's test it. We saw show rate go from about 80% and we dropped it down. I think it was a 20% decrease in show rate across multiple different closers.

15, 20% decrease in show rate. Which is crazy, right? Cause it's like, alright, we just basically lost out at that point.

You know, we're pacing, you know, doing 4 million a month. So our short decrease 20%, if we were to roll, roll that, roll that out across the entire team, that means we would've lost \$800,000 a month cause of that off this one 90 thing, right?

And so it's really important that when you're doing this, you, you put the text exactly as they're written.

You don't change them, you modify them.

Just only change your business name and like, you know, the company name. Everything else could be exact same. We've done this in fitness, we've done this in Biza, we've done this in b2b.

It's worked in every single market. We tested it in even on sales that are like more emotional and whatnot, like the cancellation fee, fee works.

It's really powerful and it's very important that it's done like this way because we've tested it eight, you know, 8,000 times, you know, a lot of different ways.

And this is the way we found to work best. And so if you have a team of centers and closures, don't let them tell you that people are getting annoyed.

Cause they will tell you that the one person out of, you know, 10, 15 calls, 20 calls, that they get annoyed and they'll blow that up.

But they don't think about the 3, 4, 5 people who wouldn't have shown up if a cancellation fee hadn't been in place.

So just as a, a fair warning based on, you know, going through this ourselves do not change this, right?

Keep this in place. Until you have gotten the point, you have an 80, 90% sure rate at that point. Even then we, we've tried it, we tested it, right?

But this will work. I promise you, we've done this a lot of times, a lot of different companies, a lot of different industries.

This works, you know, plain and simple. So that being said, for all the process and really in this video I just wanna make sure you guys, you know, understand like why we do it with that, that way for yourself even, because I know you feel kind uncomfortable as well, right?

We're going through and you're gonna like tell this person. It feels like you're threatening them sometimes almost. But I promise you, like it's, it's for these people's best interest.

And if they agree to the fee on the set call, then you know, they should have no problem with being around about it, right?

At the same time. Now if you don't, the set call, obviously people are gonna p****d off and angry if you didn't tell the fee.

They're like, Hey, why you charging me a, tell me about that. That's why it's really important to anchor this in the set call.

Now, if you anchor this property in the set call, you tell 'em about it, they agree to it then you shouldn't have any problems with this in the flow.

Vidalytics

What's up guys? So final video here going through Vidalytics and kind of the, the way we set this up cause this, again, one of the important components of the reminders.

One of the things we do in the reminder sequence is that if someone doesn't finish the video completely, we actually send them a text reminding them to watch the video.

Cuz you know, as you saw before, going through prospects watch the video makes a insane difference.

You know, even when, when I was closing one of our previous offers I remember actually closing before

there was a Preco video in place and I'd hop on the calls would be lukewarm, semi interested and I'd take them from that to like willing to give us \$10,000 in cash on the spot, the end before finding us in place. All that jazz back in the wild West days. And I remember I distinctly remember my first call when there was a Preco video in place because we created it.

We worked in a few, few days, launched it. And I remember getting in the call and usually it took me like 15, 20 minutes to get like deep with somebody.

And like the point where I was like, we're getting in the meat of the call, get a really good gap, et cetera. Like really deep. And I hopped on this call with this guy and I asked him, you know, you know, I think it was, I won't say his, you know his name, but John for example, like John, you know, tell me about this. You watched the video, awesome. Like, well what'd you think about it? What were your, your main parts? He took away and for five minutes he goes into this, this rant, this tangent about how he was day trading and he was making money overall each month, but it was so stressful cuz he'd, he'd lose money some days, he'd make money some days and he's like, dude, I, I just gotta get out of it, man, I can't do this any longer.

I, I just need a new, new way to do stuff. And like, I remember sitting there on the close call and I was just shocked, you know, I was on the phone, like my mouth was like wide open.

I was like, this is crazy. Like, like, like this is crazy. Like what do I do? You know? Because a lot of times I had to really, you know, massage that to get to that place of the prospect.

But he had gone to the Preco video. The Preco had done his job, they had closed him but 30 minutes before I talked to him.

And now it's basically like we were 30 minutes into a close call, you know, at the start of it, which really has blew me away.

So the reason I tell that story is because this vili and also the automation above here, these ones will get your prospects to watch the pre-call video.

You should have at least 80 to 90% of people watching most of the video. Then you're probably gonna have about half the people, 40, 50% watch the entire video to its end.

But even people watch half of it are much better prepped for the call with you. Then people who watch the only 40%.

And actually I'll say in fact for our pre-trial video we have 40% of it watch the entire three hour video to the end, which is pretty incredible when you think about that.

So really for your video, if it's a half an hour, 45 minutes, you should have 70 to 90% watch that to that rate.

If it's two, three hours, then probably about 40% will watch the end of the three hours if it's a really good video.

And again, we're obviously exactly how to do the video and so you should have the vast majority of people watch the video because you have these automations in place.

So that's why it's so powerful the video they set up is cuz it'll actually tell somebody and tell you when someone watch the video versus when they don't and they do a mind about the cancellation fee again to watch the video, which gets watch rate really, really high.

Like weirdly high. If there's anything else we've tried, done and tested.

Setup automations to book calls through email & text

Hey, what's going on guys? So we're gonna go ahead and talk about automated booking and how we can actually use our opt-ins and go high level to automatically reach out to people trigger some responses and actually get them to want to book a call with us.

So in go high level here this is a snapshot that I actually built for all of you guys. So if if you guys want this snapshot, just reach out to us.

We're happily give you the link. If you are getting a account set up under our parent account we'll get you a account that looks just like this upload that for you, and then you can of course use that.

But if we go to automation here and we go to get responses, workflow, and of course we name it that very intentionally, because again, the whole idea is to get responses, right?

So I'm kind of gonna just walk you through this here really quick, how it works and how we use it personally as well.

So we trigger this by contact tag, right? So usually if you have an opt-in, come in whether that's through ClickFunnels or if you use go high levels, funnel Builder or Website Builder, whatever that may be and you bring them into go high level here I can only advocate to tag people and make sure you can filter 'em that way.

And that way, again, when somebody gets added with that tag, you can just simply go ahead and tag 'em. So literally the first text message we send out is, you know, contact first name.

So it's just Jared. And then, you know, we're kind of waiting for like a, who's this right? Response. And so that's what I always encourage you guys to also think about as well as when you're, when you're looking at this workflow right here, okay, we zoom out a little bit when you're looking at this workflow, we're trying to direct them down almost an AB path.

And how we do that is we ask 'em a question or we present information that makes, almost makes them respond in a certain way.

So again, contact first name, we're looking for like, who's this, right? And so we have a wait step here that's just wait one hour or respond.

So contact, reply, and then we time it out by one hour and SMS number one that's just what I name it.

And then from there we're gonna do an if else condition. If we're gonna go contact replied yes, then we'll put 'em down here and we'll say, you know, it's Air AI team looking to get you set up with a case study that you requested from us.

Chances are, if you're watching this, you actually probably may have gotten some of these automations.

And then from there we wait five minutes and we go on.

You know, I would also love to get you some, some internal resources that we can currently use current or currently using to scale our company.

We have a few different tools depending on the type of business plus what you, what they need. Let's jump in quick so we can figure it out, right?

And then as I have 1:00 PM 3:00 PM 5:00 PM which works best for you. Okay? So we send out those two texts right there within five minutes of each other, and then we are gonna wait three hours for a response.

Now if they respond, we personally have a virtual assistant that goes in the background there and actually you know, then picks up the conversation from there.

But in the case that you don't have a virtual assistant to do that and you are doing it yourself or another team member is doing that, you can actually come in here and just do a internal notification and you can actually send a quick text message to the assigned user or a particular user, a particular number you know, whatever that may be.

And they can come in here and you can go, Let's see here, Has responded to booking a call with us, You know, and then what again, whatever that may be.

So you can do that there. Now, if they don't reply here we're just gonna simply, Hey, just bumping this for you, right?

Just a quick reminder, we're gonna wait three hours or respond another one. You know, Hey, you know, did you see my last message?

Okay. And then again, we're gonna wait five hours, see if they respond. And then, you know, it's just a quick do live question mark, right?

Just to get a, some type of response to generate that conversation, keep it ignoring and get them to respond and say, yes, I'd love to book a call with you guys.

Now if they don't respond here after the one hour up top we then send them here and say, you know, Hey, you there.

And again, we're looking for a yes and even if they don't respond to this one, we're still gonna send this one after three hours.

It's air, you know, air AI team just looking to get you set up with a case study you requested from us, right?

Because that is what our opt-in is on the front end of air right now. So that's how this system works.

Super simple. It's quite literally already built out for you in this automation. It's called Get Responses Workflow. All you have to do is come in here, do the tag and if you see this custom value here sorry, right here you see that custom value there offer name.

The reason I do that like that is because you can just come into settings here and you go down to custom values and you can grab the offer name and you can do Air AI just like that, and it will populate that field for you automatically.

So all the text messages are built like that. That's why we do offer name. You can do logo closer title.

So if you have closes on your team like us, we're, they're executive consultants. So all I would do is come in here and just type in Executive two.

Okay? Just like that. And next thing you know, again, everywhere where I have this right in a text message, email wherever it may be, it will pre-populate that text right there.

So super valuable, super expansive and scalable across multiple places. And for you, you know, coming in here and getting the snapshot, all you literally have to do is just come in here and add those two things right there and all the automations will work exactly how they should for you.

So again, you know, if you wanna come back into this automation get response workflow and you wanna switch it up a little bit, right?

Yeah, absolutely Ken, this is just what we currently use. It's how we book our appointments right now in a lot of different ways.

And, and yeah, it worked well. So again, this is a fantastic tool. It's already built out for you. And I just showed you a couple different ways.

You can come in here and just grab, you know, an internal notification, send it to your team send it to yourself, notify yourself of that conversation in here.

And then you can go pick it up in the actual conversations tab right here. You know, it'll show up for you and go from there.

So, lemme know if there's any questions on this section specifically, like I said, if you want this snapshot and everything we have built out in here for you guys, as far as the exact appointment reminders we use literally everything, the different automations can't call canceled whatever that may be.

Even the calendars we have set up as well. If you guys want that automation and all these different things that we've already pre-built out for you let us know.

If you need to get set up on it, go high level count again, let us know and we will get you all set up and ready to rock and roll.

So again, look forward to having you guys utilize this and actually take advantage of it. It's super effective great response rates and and yeah, it works well for us and so it'll work for you.

Appreciate you guys.